EPWP Integrated Reporting System (IRS)

System User Manual

Step-by-step guide for Capturers, Viewers and Authorisers

public works
Department:
Public Works
REPUBLIC OF SOUTH AFRICA

EXPANDED PUBLIC WORKS PROGRAMME

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EPWP Integrated Reporting System User Manual

The EPWP Integrated Reporting System user manual is for the capturing, viewing and sign-off EPWP Projects.

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SECTION 1: INTRODUCTION

This is a manual for the user ("user manual") of the EPWP Integrated Reporting System (IRS). It outlines detailed processes that have to be followed by a user who either captures, view and or signs-off an EPWP project on the system.

This user manual is a step-by-step guide on how to access the system, capture, view, update, and sign-off EPWP projects.

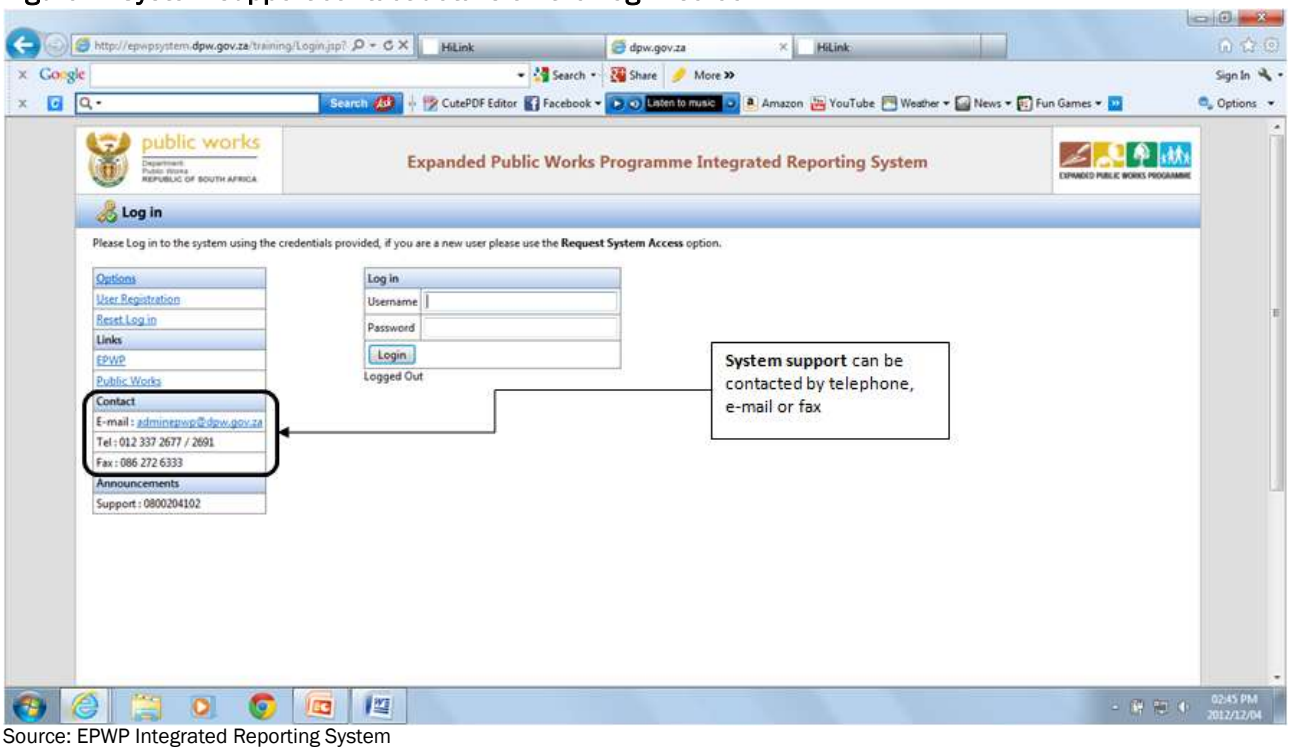
1.1 SYSTEM SUPPORT

When experiencing system related problems such as login to acquire username, re-set password or require any other form of assistance on the system, system support is available at:

1. Telephone: 087 357 2227/8, or
2. E-mail: adminepwp@dpw.gov.za, or
3. Fax: 086 272 6333

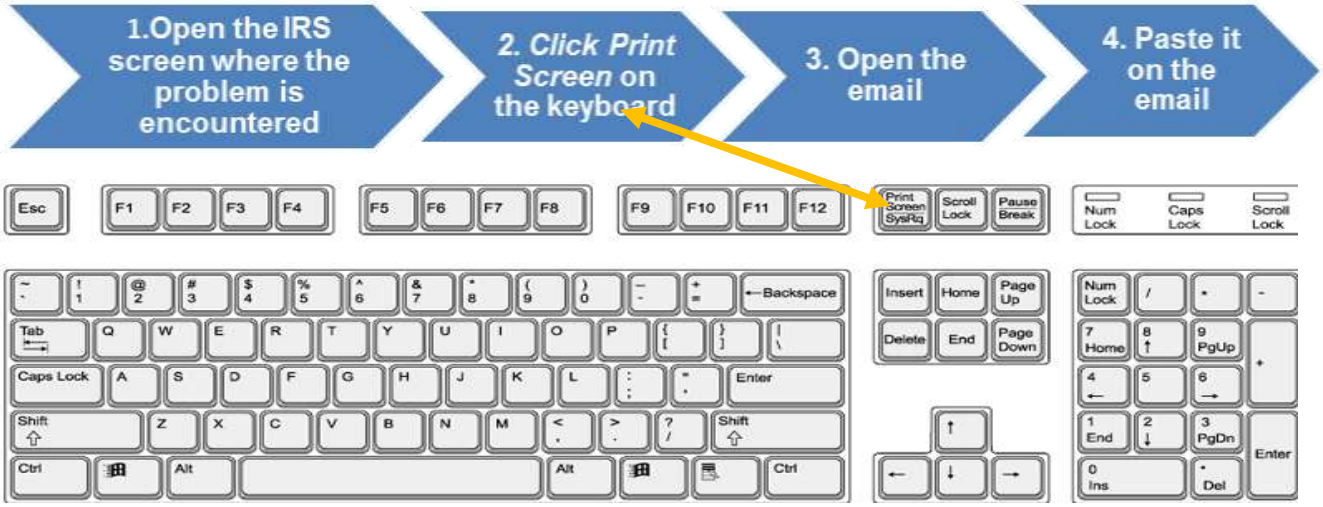
The above system support information can also be found on the log-in screen *(figure 1, below)*.

Figure 1: System support contact details on the Log-in screen



Source: EPWP Integrated Reporting System

When encountering challenges during capturing, it is advisable to print screen and paste to email for effective support on the system. Below are the steps on how to print screen:


1.Open the IRS screen where the problem is encountered
2. Click Print Screen on the keyboard
3. Open the email
4. Paste it on the email

SECTION 2: UNDERSTANDING EPWP

2.1 WHAT IS EPWP?

The Expanded Public Works Programme (EPWP) is a national labour intensive programme initiated by government that is aimed at providing poverty and income relief through temporary work for the unemployed to carry out socially useful activities. It draws significant numbers of unemployed people into productive work, so that they gain skills and increase their capacity to earn income. *It is further reflected as a programme to provide public or community assets or services through a labour intensive programme initiated by government and funded from public resources (Ministerial Determination).*

The EPWP phase I was launched in April 2004 aimed to promote economic growth and create sustainable development. The goal of EPWP phase I (April 2004–March 2009) was to help alleviate poverty and unemployment by creating, at least, 1 million work opportunities (WOs) targeting 40% of the beneficiaries be women, 30% youth and 2% people with disabilities. The first phase (or phase I) of EPWP exceeded its 1 million target one-year ahead of time by creating 1.6million WOs.

Building from the success of Phase I, Government decided to continue with this labour intensive approach to combat poverty and unemployment by setting targets at 4.5 million WOs and 2million Full Time Equivalence (FTEs). The concept of FTEs aimed at increasing the duration of employment into any EPWP project. WO relate to paid work created for an individual on an EPWP

project for any duration. The same person can be employed on different projects and each employment period will be counted as a work opportunity, whereas FTE refers to person days of work and training divided by 230 days. Thus, 1 FTE is equivalent to 230 person days. The EPWP phase II was launched in April 2009 and aimed to create 4.5 million short and on-going WOs with an average duration of 100 days over the five-year period (April 2009–March 2014). Thereafter, 4.920 million WOs plus 2.020 FTEs were created.

Currently, the EPWP is in the 3rd phase (phase III) launched in April 2014 and aim to create 6 million WOs and 2 million FTEs during the five year period (April 2014–March 2019).

2.2 Objectives and Key Characteristic of EPWP projects

The objective of EPWP is to utilize public sector budgets to reduce and alleviate unemployment. This objective is to be achieved by creating productive employment opportunities and by enhancing the ability of workers to earn an income after they leave the programme, either in the labour market or through entrepreneurial or cooperative income-generating activities. Work opportunities are created, through intensive methods, in the following four ways:

a) Government-funded infrastructure projects;

b) Creating work opportunities in public environmental and culture programmes (e.g. Land Care);

c) Creating work opportunities in public social programmes (e.g. community care workers); and

d) Utilising general government expenditure on goods and services to provide the work experience component of small enterprise learnerships or incubation programmes.

The ability of workers to earn an income after they leave the programme is expected to be enhanced by providing participants with a combination of work experience and skills development programmes.

Table 1: Objectives of EPWP

Below are key four objectives:
➢ To increase the contribution of public sector expenditure on goods and services to the alleviation of unemployment. ➢ To provide (unskilled) unemployed people with a combination of work experience and training

- To deliver quality, cost effective services using labour intensive techniques
- To contribute to halving unemployment by 2014 through public and community service delivery

The above goals find expression in the four sectors (Environment & Culture, Infrastructure, Non-State & Social), which serve as vehicles for delivery of the programme.

While many projects and programmes of government create employment, not all of them are classified as EPWP projects or programmes. Given the wide variation of projects implemented by government, it is not always straightforward to distinguish between EPWP projects and non-EPWP projects.

The key characteristics of EPWP projects are listed below:

a) They employ large numbers of local, low skilled, unemployed persons who are willing to work – this is the EPWP target group

b) They are highly labour intensive: a large percentage of the overall project costs are paid out in wages to the EPWP target group

c) They provide a service to or develop an asset for the community.

2.3 THE SCOPE OF EPWP

EPWP is a cross-cutting programme and it covers all three (3) spheres of (local, provincial & national) government, State Owned Enterprises (SOEs) including Non-State Organisations (NSOs). The Monitoring and Evaluation (M&E) Directorate of the EPWP unit reports on all EPWP projects across the four (4) sectors of EPWP, namely:

- **Environment & Culture** Sector (e.g. Working for Water, Land Care),
- **Infrastructure** Sector (e.g. Labour-intensive Construction and Maintenance),
- **Social** Sector (e.g. Home-Based Care and Early Childhood Development), and
- **Non-State** Sector

2.4 KEY INDICATORS FOR EPWP QUALITY REPORTING

2.4.1 Work opportunity

It is paid work created for an individual on an EPWP project for any period of time, within the employment conditions of the code of good practice for special public works programmes. In the case of social sector projects, learnerships will also constitute work opportunities. The same

individual can be employed on different projects and each period of employment will be counted as a work opportunity. Information to be reported is the number of work opportunities created.

2.4.2 Person-days of work

The number of people who worked on a project times the number of days each person worked for the entire project duration.

Example 1:

Person A worked for 10 days

Persons B and C worked for 8 days each and

Person D worked for 3 days

(1X 10) + (2 X 8) + (1 X 3) = 29 person-days of work to be reported

Example 2:

Twenty people worked for 20 days a month for 12 months

20People X 20 days X 12 months

(20 X 20 X 12) = 4800 person-days of work to be reported

2.4.3 Person-days of Training

The number of people who worked on a project times the number of days each person trained. A training day is at least 7 hours of formal training. Formal training is further categorised as: literacy & numeracy, life skills, vocational skills and business skills and includes the assessment of beneficiaries. For each category of training a distinction will be made between accredited and non-accredited training days and type of training received whether learner ship or skill. In the case of the social sector (and for all sectors from 2005/06) information on credits (towards NQF qualifications) and NQF qualifications acquired will also be reported. *Information to be reported: Number of person-days of training and course specification.*

2.4.4 Learnership

A learnership combines work-based experience with structured learning. It results in a qualification that is registered within the National Qualifications Framework (NQF) by the South African Qualification Authority (SAQA). A learner who completes a learnership has a qualification

that signals occupational competence and which is recognised throughout the country. A learnership requires that a trainer, a coach, a mentor and an assessor assist the learner.

2.4.5 Project Budget

It is the overall budget including stipend for the project. Is price tendered by the contractor + the professional fees for the professional service provider appointed to design and supervise the project. The project budget excludes government management & administration costs.

2.4.6 Project expenditure

Is actual expenditure (as defined by National Treasury) on projects and supporting infrastructure, including stipends, feasibility studies and research but excluding government administration costs. Information to be reported: figures / rands of actual quarterly expenditure

2.4.7 Daily Wage Rate

Daily wage rate (whether task-rated or time-rated) per individual project. A monthly wage should be converted into a daily wage through division by the average number of person days per month. Information to be reported is daily wage per beneficiary.

2.4.8 Demographic Data

The EPWP is targeting unemployed, local, low skilled South African citizens willing to work on EPWP projects. The proportion of beneficiaries that fall within the following categories must be recorded:

Youth i.e. 18 – 35 years of age

Women

People with Disabilities / physically challenged

The definitions contained in the Preferential Procurement Regulations of 2001 for these categories of beneficiaries will be utilised. Information to be reported: Number of Youth, Women and People with disabilities.

2.4.9 Full Time Equivalent (FTE)

One full Time Equivalent is equal to 230 days of work and training. This number was decided on in the following way:

I Year		365 days
Weekend days	_	104 days
Public Holidays	_	10 days
Annual leave days	_	21 days
	=	**230 days**

For task-rated workers, tasks completed should be used as a proxy for 40 hours of work, based on a task completed in a week.

Formula for Calculation:

Number of FTEs = (Person days of work + person days of training) / 230

2.4.10 EPWP incentive grant

It is a grant paid to public bodies to incentivise creation of work opportunity. The grant is paid per quantum of employment created for the target group

2.5 THE ROLE OF M&E IN EPWP

The M&E Directorate of EPWP focuses on two areas namely; (a) Monitoring and (b) Evaluation.

a) Monitoring Role:
   - Data Collection and Capturing – monitoring for good quality data
   - Data Verification – monitoring for compliance with EPWP policy
   - Data Validation – monitoring whether data is included or excluded as per requirements

On a monthly basis, Monitoring unit validate raw data and provide feedback to reporting bodies via Lead Departments, Provincial Coordinators and Programme Managers so that they rectify by updating their project reports directly into the reporting system. It should be noted that projects and participants that fail validation will not be used in the quarterly report BUT will remain in the EPWP database. These projects and participants will be considered for inclusion in the report for the current quarter as soon as they are corrected.

b) Evaluation Role:
   - Commissioning of studies to evaluate the impact of EPWP in terms of the key drivers of job creation and poverty alleviation

- Conduct data quality audits (DQA)

EPWP M&E verify and validate captured data prior reporting to the Minister and Treasury, so good quality data is important.

2.6 WHAT IS GOOD QUALITY DATA?

Good quality data has the following dimensions, that is:

- Accurate and valid – of the original source;
- Reliable – data are consistent;
- Accessible – data are available to authorised persons when and where required (during DQAs)
- Relevant and useful – information is pertinent and useful

Good quality data also has the following characteristics ("the three (3) C's"):

1. Correct
   - Accurate and valid from the original source
   - Captured data reflects what actually happened
2. Complete
   - All reporting units must submit their data
   - All required data elements should be recorded
   - No gaps in data and it is pertinent and useful
3. Consistent
   - Stable and reliable data
   - No unexplained variations in data and it is available when required, e.g. during data quality audits
   - Data is consistent

2.7 TOTAL QUALITY MANAGEMENT

According to Deming W. E (1982) corroborated by Juran J (2004) Total Quality Management (TQM) refers to management methods used to enhance quality and productivity in business organisations. TQM is a comprehensive management approach that works horizontally across an organisation, involving all departments and employees plus extending backward and forward to include both suppliers and clients/customers. TQM is only one of many acronyms used to label management systems that focus on quality. Same applies to other systems; TQM provides a framework for implementing effective quality and productivity initiatives that can increase the profitability and competitiveness of organisations.

TQM leads to increased productivity and cost-effectiveness that involves below six basic concepts:

- The involvement of the entire workforce – active participation(*Collector, Capturer, Viewer / Authoriser and Sign off)*
- The commitment from management in providing top-to-bottom vice versa supports (*e.g. work and training days, budget & exp.*)
- A focus on the requirements for compliance/inclusion
- The continuous improvement of processes
- The involvement of all stakeholders such as Data Collectors, Funders, Implementers, Coordinators and Partners (PPP)
- An effective utilisation of performance indicators

2.8 EXCLUSION RULES: CHECKS THAT DISQUALIFIES PROJECTS FROM INCLUSION IN THE QUARTERLY REPORT:

The following are rules that exclude projects from inclusion in the quarterly report:

- Project has no budget
- Project has no expenditure
- Project has no person-days
- The expenditure of the project exceeds the budget by more than 20%
- Project has no daily wage
- The total maximum employment period exceeded as determined by the Ministerial Determination (23 days)
- Total maximum employment period exceeded (23 days)
- There is a duplicate projects
- Beneficiary is under sixteen years of age
- Beneficiary is without valid form of identification (ID)

2.9 PROJECTS /PARTICIPANTS RULES THAT SUBJECT THE PROJECT/PARTICIPANTS TO A WARNING

Project owners / capturers will be alerted if the following validation rules are not met:

- Project pays below the minimum wage as specified in the Ministerial Determination

✓ Project outputs are not reported (services and / or assets)

✓ Expenditure is more than the budget by less than 20%

✓ Projects or participants records are not available

NB: Employees permanently employed by the Service provider (Contractor) such as Engineers, Artisans etc should not be reported as they are in their payroll and no work opportunity created on them.

2.10 DATA VALIDATION

EPWP Phase II data validation is automatically done by the system during capturing. It should be noted that there are things that the system cannot validate hence you still finds compliant projects that will be excluded after being validated by Monitoring and Evaluation. After the cut-off date for the quarter (by which all projects should have reported), EPWP Monitoring and Evaluation accept data and validate for duplicates and other inconsistencies.

2.11 HANDLING OF EXCLUSION

Projects that do not meet the validation requirements are excluded. If the data of the project is improved, the project may be included in the next quarter by the capturer.

2.12 THE EPWP REPORTING SYSTEM AND PROCESS

2.1.2.1 Introduction

The aim of this document is to outline processes that have to be followed by system users, for example data capturers, when capturing EPWP projects on the system or viewers when generating reports. In short, this document provides sequential step-by-step guidelines on how to access the system, capture, view, sign-off and update projects.

2.12.2 Overview of the EPWP Integrated Reporting System

The EPWP Integrated Reporting System ("IRS") is a planned system for collecting, storing and reporting data on EPWP projects. The system is managed by the National Department of Public

Works and only delegated representatives of public bodies that implement EPWP projects are permitted access to the system.

There are specific procedures and deadlines that have to be met in terms of reporting.

2.12.3 Loading updated project performance on the EPWP IRS

First, it is important to note that public bodies in provinces and municipalities are required to update EPWP project information at every monthly reporting cycle onto the EPWP IRS. Second, key data that must be reported on for every project must include:

2.12.3.1 Beneficiary information: A beneficiary list must be uploaded for every project. This will contain profile data of beneficiaries. A beneficiary form will be provided to public bodies and this form should be filled in – weekly or bi-weekly – and provided per project per monthly reporting cycle. The form requires the following information to be kept and maintained:

i. Identity – name, surname, date of birth and an identity number
ii. Gender, age and disability status
iii. Education and literacy level
iv. Daily wage to be received
v. Training attended

2.12.3.2 Site information: The following information, to confirm the number of people at work daily, must be maintained and provided by the public body to National Public Works on a monthly basis:

i. Daily site attendance register – attendance registers showing all the beneficiaries that were registered at work must be completed on site on a daily basis. These must be signed-off by the project manager on a weekly basis. The contracted consulting organisation will pay beneficiaries fortnightly.
ii. Summary of monthly attendance – the contracted consulting organisation will compile a monthly summary for the public body.

2.12.3.3 Payment information: This generally seeks to confirm what was paid, for how much work and to whom. There are various ways this can be provided and should be sign-off by the project manager:

i. Payment register – which is a list of workers, paid showing wages paid per beneficiary, signed-off by each beneficiary as proof of acceptance of payment. This register includes the name of the worker, either an identity (or other unique identifier) number, the number of days that the pay covers, the wage rate and total wages paid.
ii. Bank records showing the transfers to each worker account signed by contractor as proof of payment – which must specifically show the name of the worker, the identity (or other unique identifier) number

2.12.3.4 Performance information: This information will be captured in a progress report template and will draw information on person days of work, performed against FTE targets, training days, beneficiary profiles and wages paid.

2.12.4 Process and timeline for project progress reporting on the EPWP IRS

To ensure that the required data is collected every month, there are specific due dates for submission:

i. By the 25th of every month, the above required data must be collected by the contractor.
ii. The contractor will provide the progress report to the project manager for sign-off before the end of the month.
iii. The project manager will then submit all the necessary signed-off documentation to the public body.
iv. The public body will approve and sign-off on the submitted report by 7 days after the end of the month and will provide the TA with a copy of the data.
v. The will be a process of validation between the TA and the public body thereafter from 7-14 days after the end of the month (which can happen before, and after the capturing of the data on the EPWP IRS).
vi. The TA will enter the data onto the EPWP IRS before 11 days after the end of the month. All information loaded on the EPWP IRS must be signed-off quarterly by the relevant public body (represented by the delegated official) in order to be considered for the incentive for that quarter.

NB: The EPWP system reporting cut-off date is the ***15th after the closure of a Quarter*** *OR* ***on the 15th after every fourth month as illustrated below:***

April	*May*	*June*	*July*	*Aug*	*Sept*	*October*	*Nov*	*Dec*	*Jan*	*Feb*	*March*
Quarter 4 cut off	**Update**		*Quarter 1 cut off*	**Update**		*Quarter 2 cut off*	**Update**		*Quarter 3 cut off*	**Update**	

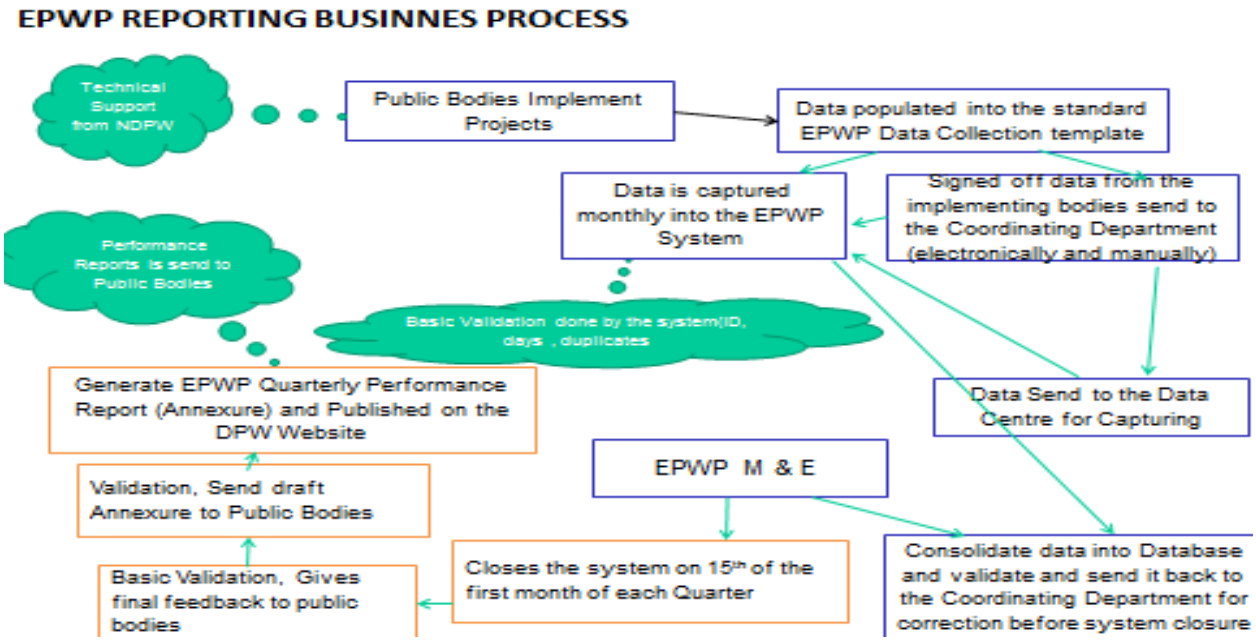
The National Public Works will assist public bodies to produce monthly and quarterly reports from the system as indicated above. There are various types of report that can be generated from IRS to help all parties to manage or oversee the programme, these include:

- Standard Reports
- Project Reports
- Beneficiary Reports
- Labour Intensity Reports
- Sector Financial Year Reports

- Average Duration Reports
- Work Opportunities Reports

2.13 EPWP Monitoring and Evaluation Business Process

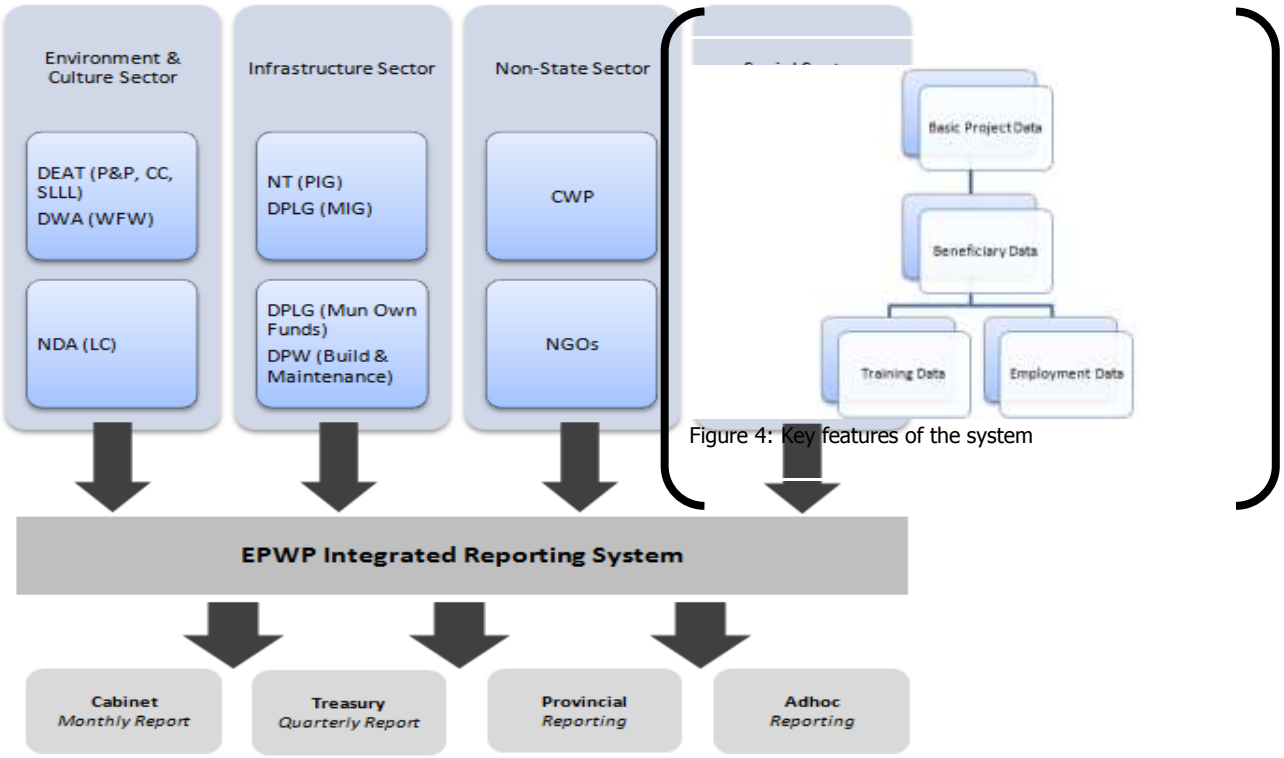
Public bodies are expected to capture and update their project data (deliverables) on a monthly basis. Below process is in place to assist in the generation of reports on the work opportunities and FTEs created:


EPWP REPORTING BUSINNES PROCESS
Technical Support from NDPW
Public Bodies Implement Projects
Data populated into the standard EPWP Data Collection template
Data is captured monthly into the EPWP System
Signed off data from the implementing bodies send to the Coordinating Department (electronically and manually)
Performance Reports is send to Public Bodies
Basic Validation done by the system(ID, days , duplicates
Generate EPWP Quarterly Performance Report (Annexure) and Published on the DPW Website
Data Send to the Data Centre for Capturing
EPWP M & E
Validation, Send draft Annexure to Public Bodies
Basic Validation, Gives final feedback to public bodies
Closes the system on 15th of the first month of each Quarter
Consolidate data into Database and validate and send it back to the Coordinating Department for correction before system closure

The EPWP reporting process

The three (3) spheres of government in all nine (9) provinces and the four (4) sectors of EPWP (Environment & Culture, Infrastructure, Non-State and Social) have to report on the progress of their projects on a monthly basis. The M&E Directorate of EPWP validate the captured raw data monthly and consolidate the final performance reporting on a quarterly basis to the Minister and Treasury etc.

Figure 2: Overview of the EPWP reporting process



Source: Department of Public Works (EPWP)

Figure 4: Key features of the system

All departments in all spheres are encouraged to identify EPWP projects and report accordingly. As shown in *figure 3* there are three important roles players that crucial in the reporting value chain:

Data Capturers who capture project data into the system

Data Viewers who check for correctness of the data and give feedback to data capturers

Authorisers who sign-off valid and compliance EPWP projects

2.14 KEY FEATURES OF THE EPWP INTEGRATED REPORTING SYSTEM

The system has the following:

- **Basic EPWP Project data**
  - ❖ What the project is about
  - ❖ Where it is taking place
  - ❖ How it is funded and by whom;

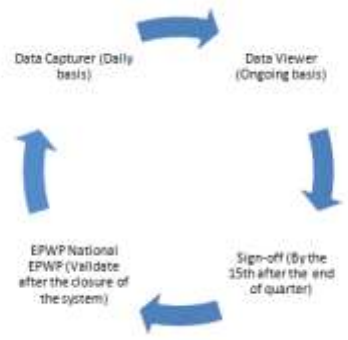

Data Capturer (Daily basis)
Data Viewer (Ongoing basis)
Sign-off (By the 15th after the end of quarter)
EPWP National EPWP (Validate after the closure of the system)

Figure 3: EPWP Reporting Process (Capture – Sign-Off)

expenditure

- **Beneficiary data**
  - ❖ Who are the beneficiaries (Name, ID)
  - ❖ Profile: Age, Race, Gender, Disability (if any)
- **Employment and training data per beneficiary**
  - ❖ Employment: Job title, duration of employment, daily wage rate
  - ❖ Training: Course(s) attended, duration, service provider

Figure 4: Key features of the system

2.15 Access Rights

Users are permitted access and functionality (capturing, viewing and sign-off) on the system according access roles they have assigned for themselves during the User Registration stage; this is before they are able to Log-in. The security features do not, for example, permit a Data Capturer user category the right to Sign-off an EPWP project.

2.16 User Categories

System users are pre-defined as follows:

- **Capturer** – has rights limited to capturing EPWP project data
- **Viewer** – checks for correctness of data and provides feedback
- **Authoriser** – signs-off valid EPWP projects

Table 2 (below) shows the rights and limitations of the three user roles in the four administration areas.

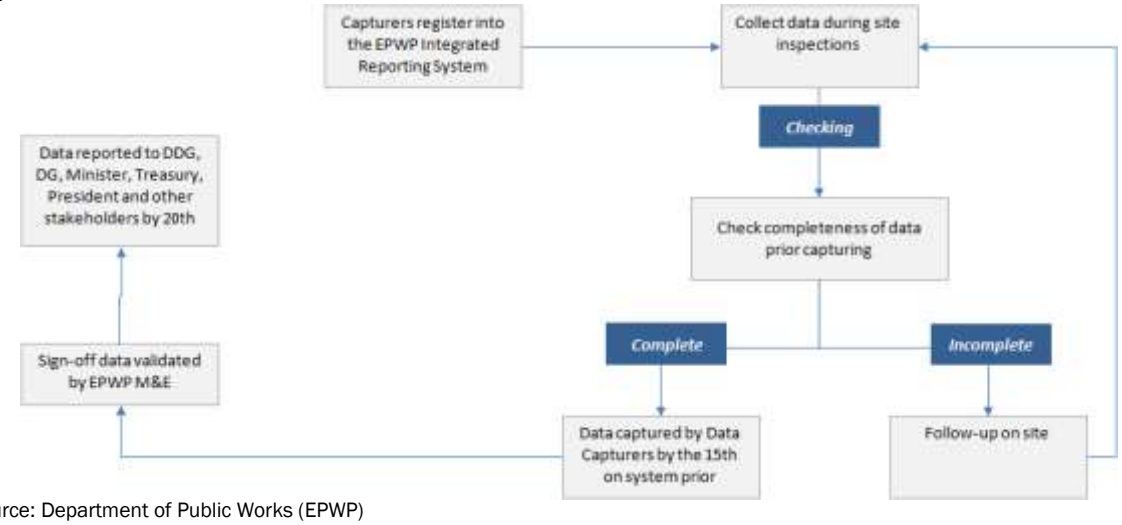
Table 2: Rights of Users in the four functional administration areas

Capturer	Viewer	Authoriser
System Administration		
Management of 'My Profile'	Management of 'My Profile'	Management of 'My Profile'
Make changes to registered profile	*Make changes to registered profile*	*Make changes to registered profile*
Business Administration		
Upload data	Incentive Grants	
Upload beneficiary data in bulk	*Filter and view*	
Project Administration		
Projects		
	Filter Records	Edit Record, Sign Off and Filter Records
	Filter and view	*View project data in detail and sign off*
My Projects		
Add Record, Edit Record and Filter Records	Filter Records	Edit Record, Filter Records
Capture and manage projects	*Filter and view*	*View project data in detail*
Beneficiaries (Beneficiary Management)		
Add Record, Edit Record, Delete Record and Filter Records	Filter Records	
Capture and manage beneficiary data	*Filter and view*	
Training Service Provider (TSP)		
Add Record, Edit Record, Delete Record and Filter Records	Filter Records	
Capture and manage TSP data	*Filter and view*	
Project Service Provider (PSP)		
Add Record, Edit Record, Delete Record and Filter Records	Filter Records	
Capture and manage PSP data	*Filter and view*	
Training Administration		
Add Record, Edit Record and Filter Records	Filter Records	
Capture and manage training data	*Filter and view*	
Sign Off Projects		
		Sign Off and Filter Records
Report Administration		
Reports	Reports	Reports
Draw and view reports	*Draw and view reports*	*Draw and view reports*

2.17 DATA FLOW PROCESS

The National M&E Unit of EPWP has set the following data flow process for capturing EPWP projects and generating reports.

Figure 5: EPWP Data Flow Process

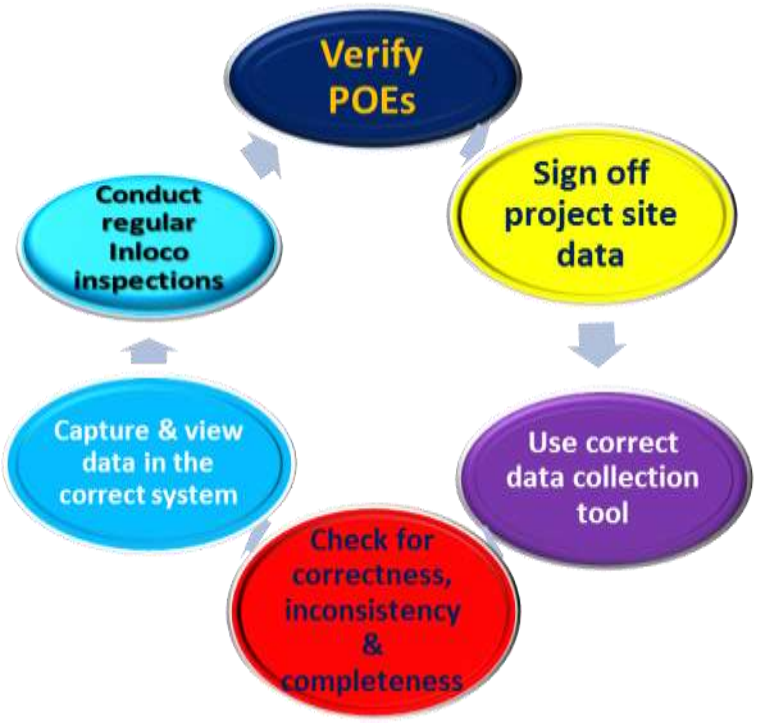

Capturers register into the EPWP Integrated Reporting System
Collect data during site inspections
Checking
Check completeness of data prior capturing
Complete
Incomplete
Data captured by Data Capturers by the 15th on system prior
Follow-up on site
Sign-off data validated by EPWP M&E
Data reported to DDG, DG, Minister, Treasury, President and other stakeholders by 20th

Source: Department of Public Works (EPWP)

- Data Capturers capture EPWP project data into the system
- Data Viewers check for the correctness of project data and give feedback
- An official delegated by the HOD views data of an EPWP project and recommends to the HOD for sign-off
- The Coordinating HOD signs-off data
- National M&E Unit accept data and check for duplicates as well as inconsistencies, and then communicates with HOD or delegated official
- National M&E Unit generates reports which include invoices for payment of the incentives to relevant reporting bodies

As highlighted in figure 5 above, EPWP reported data should be collected directly from site as primary data. Collected data should be verified using portfolio of evidence such as beneficiary workers' attendance register, payment certificate etc. A template should be created by implementing bodies for sign-off project site data during site visits. Once signed off, a correct data collection tool will be used to populate verified collected data. Thereafter, data will be captured directly into the EPWP reporting system prior cut-off date. Data Implementing and Reporting bodies are urged to follow below project site data flow reflected in figure 5(b) below inorder to avoid or minimise non-compliance project reporting:

Figure 5(b): Project Site Data Flow


Verify POEs
Sign off project site data
Use correct data collection tool
Check for correctness, inconsistency & completeness
Capture & view data in the correct system
Conduct regular Inloco inspections

The section that follows, navigates EPWP Integrated Reporting System. This is, then, followed by an outline that shows a sequential approach to the capturing of EPWP projects on the system.

SECTION 3: ACCESSING THE SYSTEM AND REGISTRATION

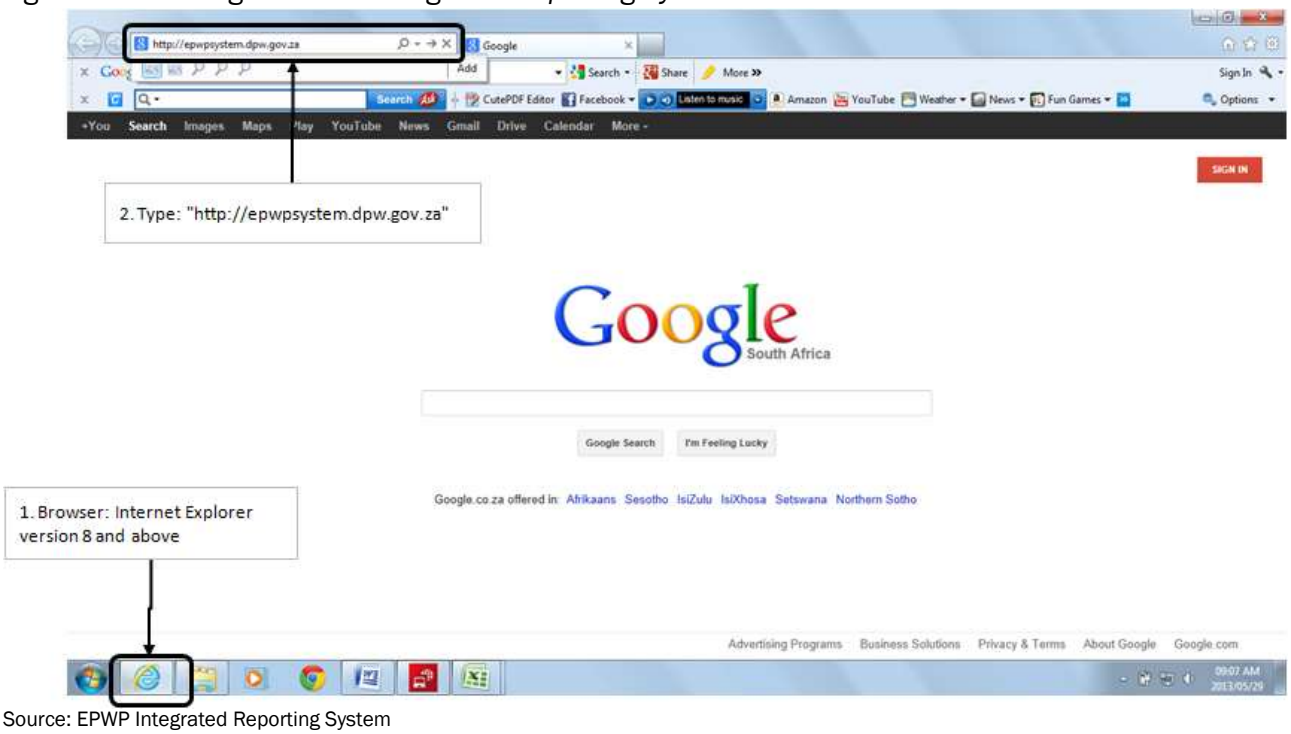
KEY AREAS:

- New user registration
- Login and logout of the system
- Reset login when you have forgotten username and/or password

3.1 ACCESSING THE SYSTEM

The EPWP IR System can be accessed from the website http://epwpsystem.dpw.gov.za to get to the system's Login page *(figure 6)*.

Figure 6: Accessing the EPWP Integrated Reporting System



Source: EPWP Integrated Reporting System

Step 1:

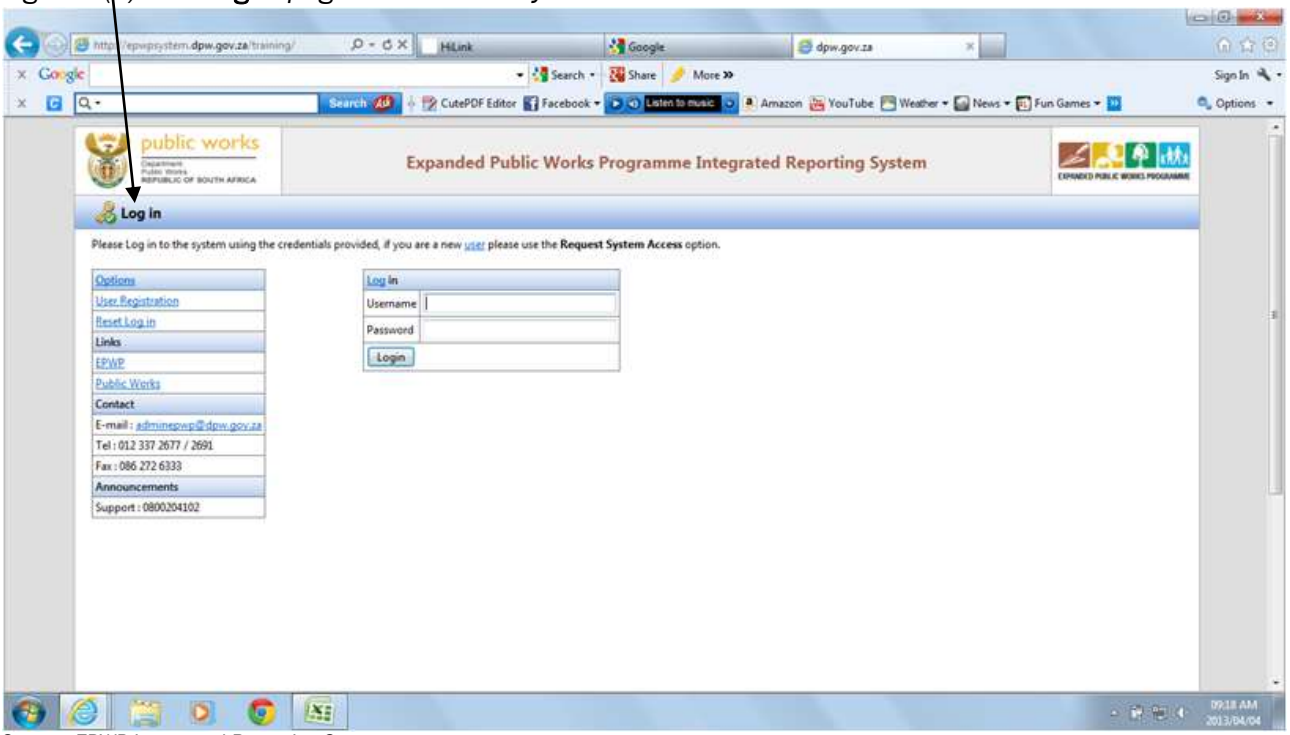
Make sure that **Internet Explorer** is your Internet Browser *(figure 6, step 1)*.

For optimal performance of the EPWP System make sure that you are using **version 8** of **Internet Explorer** and upwards (*e.g.* version: 9 or 10). Although you can access the system through older versions, such as version 7 of Internet Explorer, the system will, however, not perform certain processes. Please note that similar system usability problems will be encountered when using **Mozilla Firefox** as your browser.

Step 2:

Type the http://epwpsystem.dpw.gov.za web address, as shown in *step 2* of *figure 6* and this will open the **Log In** page of the EPWP System – as shown in *figure 6(a)*.

*Figure 6(a): The **Log In** page of the EPWP System*



Source: EPWP Integrated Reporting System

POINTS TO REMEMBER:

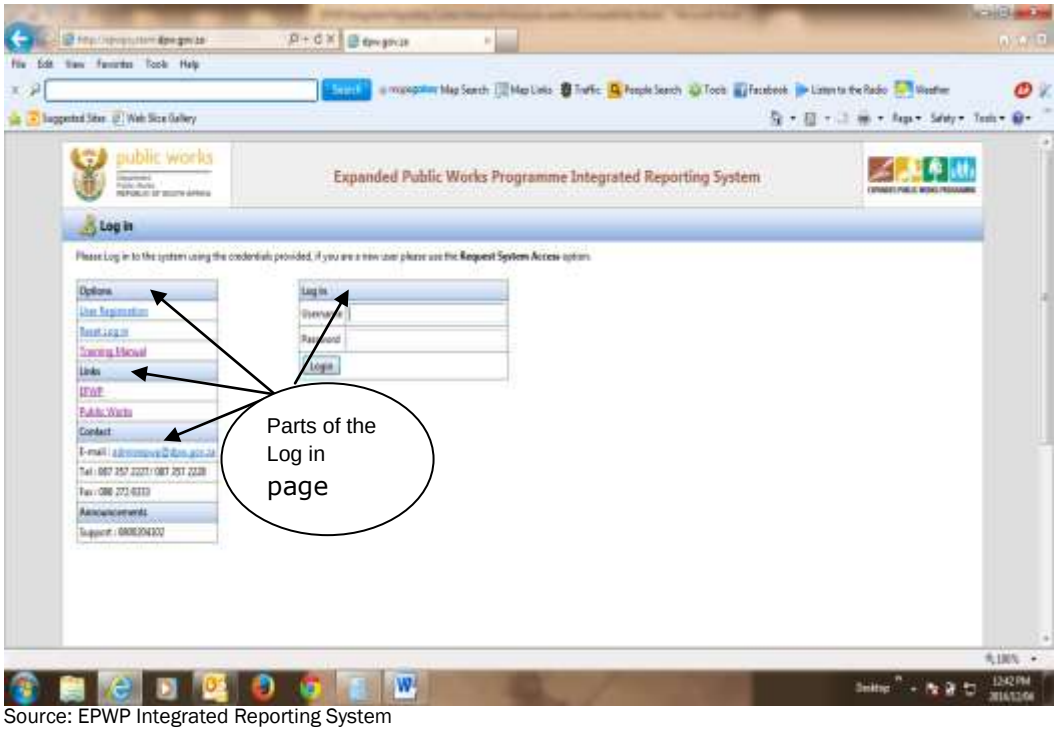
1. Make sure that Internet Explorer (version 8 and upwards) is your Internet Browser.

2. Make sure that you type the http://epwpsystem.dpw.gov.za web address as indicated in *figure 6* to access the system's Log In page.

3.2 THE LOG IN PAGE

The Log In page of the EPWP IRS System has four functional areas *(figure 6(b))*.

Figure 6(b): Functional areas of the Log In page



Source: EPWP Integrated Reporting System

Part 1: Options

Under Options there are three sub-headings – **User registration, Reset Log in** and **Training Manual**:

To **register** a new profile as a new user "click" **User registration**

If you are a registered user, but you have forgotten your log in password, "click" **Reset Log in**

For referral when using the system, you can "click" **Training Manual**

Part 2: Log In

A user that is registered on the system can enter a "username" and "password" and the system will give them access to restricted information and allow them to edit the contents of a project, depending on the extent of the access rights.

Part 3: Links

Under Links there are two sub-headings – **EPWP** and **Public Works**:

When you "click" EPWP, the system will open the EPWP website.

When you "click" Public Works, the system will open the Public Works website.

Part 4: Contact

Contact provides you with a list of options of contacting the helpdesk when you experience problems on the system. You can contact them via **e-mail**, by "clicking" on the e-mail address link, by **telephone** (087 357 2227/8) and/or by **fax** (086 272 6333) by means of the numbers that have been listed – *Also see Section 1.1: System Support details*.

3.3 NEW USER REGISTRATION

To register your profile, whether you are a new user or you are registering a profile for another role, "click" on User registration.

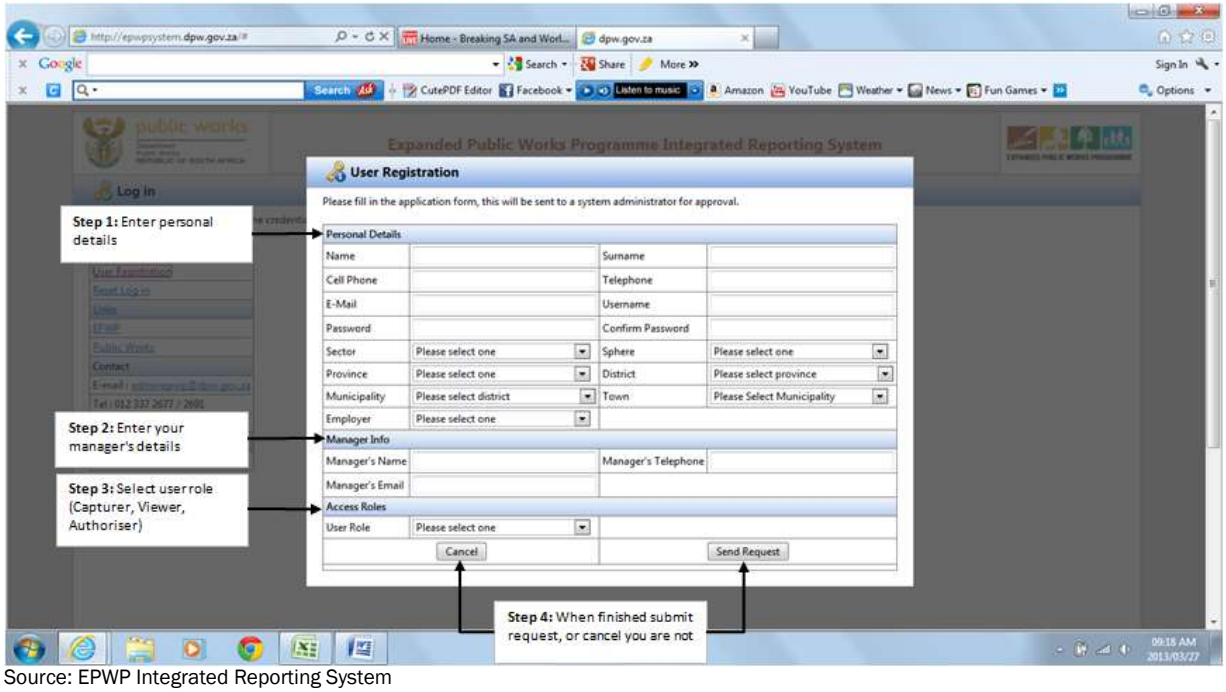
Figure 6(c): Functional areas of the Log In page

Expanded Public Works Programme Integrated Reporting System
Log in
Click User registration to register your profile

Source: EPWP Integrated Reporting System

Under **Options**, "click" User registration to get registered *(figure 6(c))* – and a User Registration form will appear *(figure 7)*.

Figure 7: New User Registration Form


Expanded Public Works Programme Integrated Reporting System
User Registration
Please fill in the application form, this will be sent to a system administrator for approval.
Step 1: Enter personal details
Step 2: Enter your manager's details
Step 3: Select user role (Capturer, Viewer, Authoriser)
Step 4: When finished submit request, or cancel you are not
Cancel
Send Request

Source: EPWP Integrated Reporting System

3.3.1 PROCEDURE TO NEW USER REGISTRATION

The user registration form shown in *figure 7* is divided into three parts (personal details, manager's information and access role) and it is compulsory that all parts be completed. *Figure 7* shows a sequence of steps that must be followed when completing the user registration form – please read the narrative below to understand the type of information required for each data field.

Step 1: Personal Details *(Please also refer to the steps in figure 7, above)*

Name: Your first name

Surname: Your surname

Cell Phone: Your cellular or mobile phone number

Telephone: Work telephone number

E-mail: Work e-mail address

Username: The name that will be used to login to the system

Password: This should be eight characters in length, e.g. code#101 may improve security levels and make it difficult for hackers to access your profile

Sectors: Choose from dropdown list the EPWP sector (Infrastructure, Social, Non-State or Environment & Culture) that is applicable to you. If you capture for and report on more than one sector, select All, instead of a specific sector

Sphere: Choose from dropdown list the sphere (national, provincial or municipality) of government that you work for

Province: Choose from dropdown list the province that you fall under

District: Choose from dropdown list the district municipality you fall under in terms of your office base. If you fall under a Metropolitan Municipality, select that option.

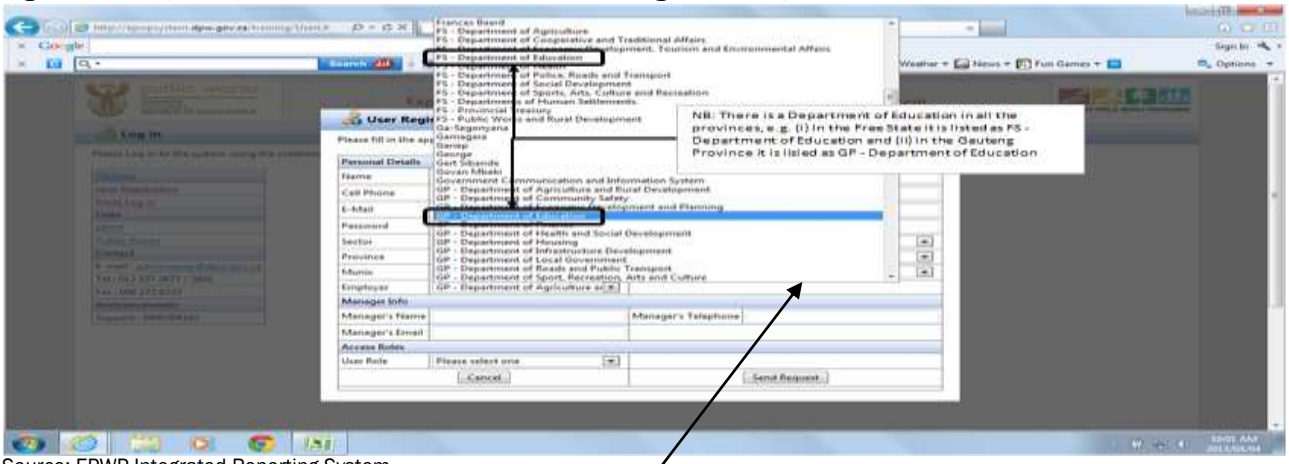
Municipality: Choose from dropdown list the local municipality you fall under in terms of your office base. If you selected Metropolitan Municipality under District, the dropdown list will only show the metro that you fall under.

Town: Choose from dropdown list the town that you fall under (where your offices are)

Employer: Choose from dropdown list your employer. It is important for users to be careful when making use of the dropdown list, as shown by *figure 8*.

For example, if your employer is the Department of Education at Provincial level, the prefix of the Department of Education or any department will indicate the province it falls under – *figure 8* shows FS - Department of Education for the Free State and GP – Department of Education for the Gauteng Province. National departments does not have a prefix.

Figure 8: Frequently observed mistake when selecting from dropdown box


NB: There is a Department of Education in all the provinces, e.g. (i) in the Free State it is listed as FS - Department of Education and (ii) in the Gauteng Province it is listed as GP - Department of Education

Source: EPWP Integrated Reporting System

Step 2: Manager Info *(Please refer to the steps in figure 7, above)*

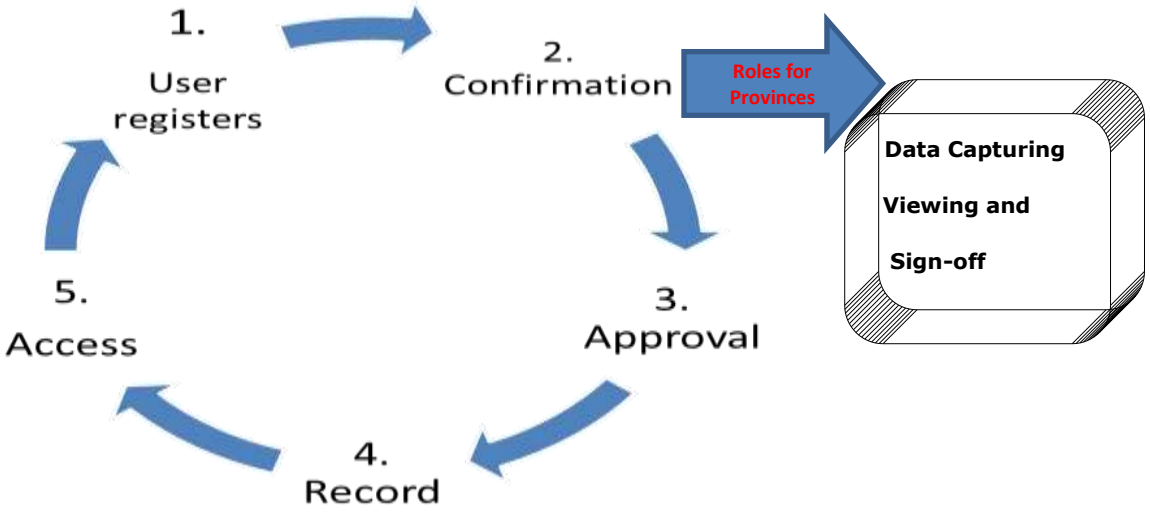
Enter your manager's information: Name – first name and surname; Telephone – work telephone number; E-mail – manager's work e-mail address

Step 3 & 4: Access Roles and Send Request *(Please refer to the steps in figure 7, above)*

The EPWP IRS System possesses security measures that allow users access according to their rights. The access rights determine such things as who may capture EPWP project data or who may sign-off. Choose from the dropdown list your role (Capturer, Viewer or Authoriser/Sign Offer) under this profile.

When finished, click **Send Request**.

The following ***business process flow*** should be noted by system users after registration. Firstly the user register, help desk confirm with managers telephonically or via emails, thereafter approve the user registration. Approved users are then recorded in the database and lastly access granted.



A response via e-mail will be sent to the e-mail address that you registered under your personal details, and where the registration has been successful, and then you can start using the system. At the moment, this process registration, which includes verification of the applicant's details, takes about 24 hours. Users are urged to follow up after registration.

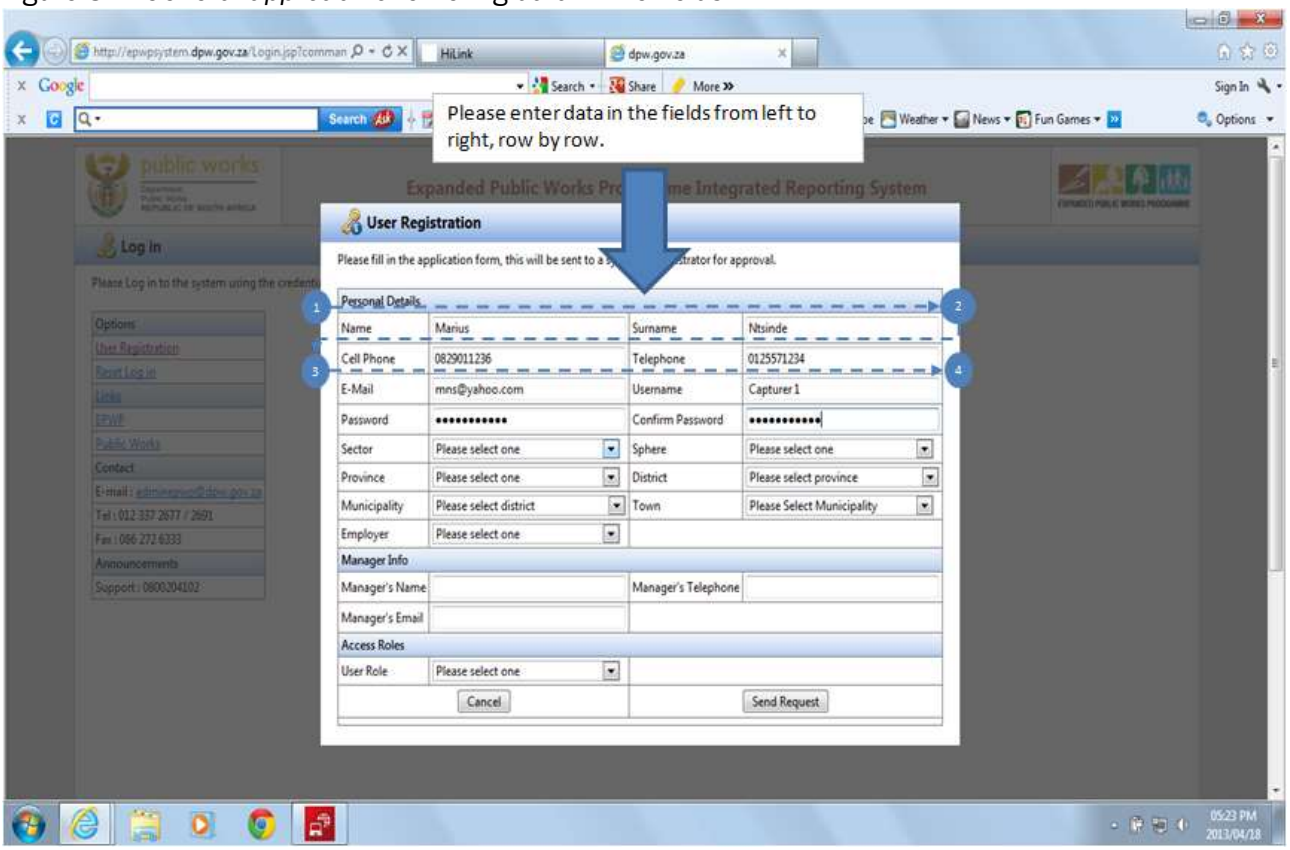
3.3.1.1 Common problems encountered by users

Common problems
This is a list of problem that capturers commonly encounter when using the system

APPROACH TO ENTERING DATA IN THE FIELDS

The logical approach of entering data in the fields of the system should be from left to right, row by row – as shown in *figure 8-1 (Correct approach)*. This is imperative as data fields to be captured are neither interlinked nor interconnected. The tab button can also be used to move from one field to another, instead of the mouse.

Figure 8-1: General approach of entering data in the fields



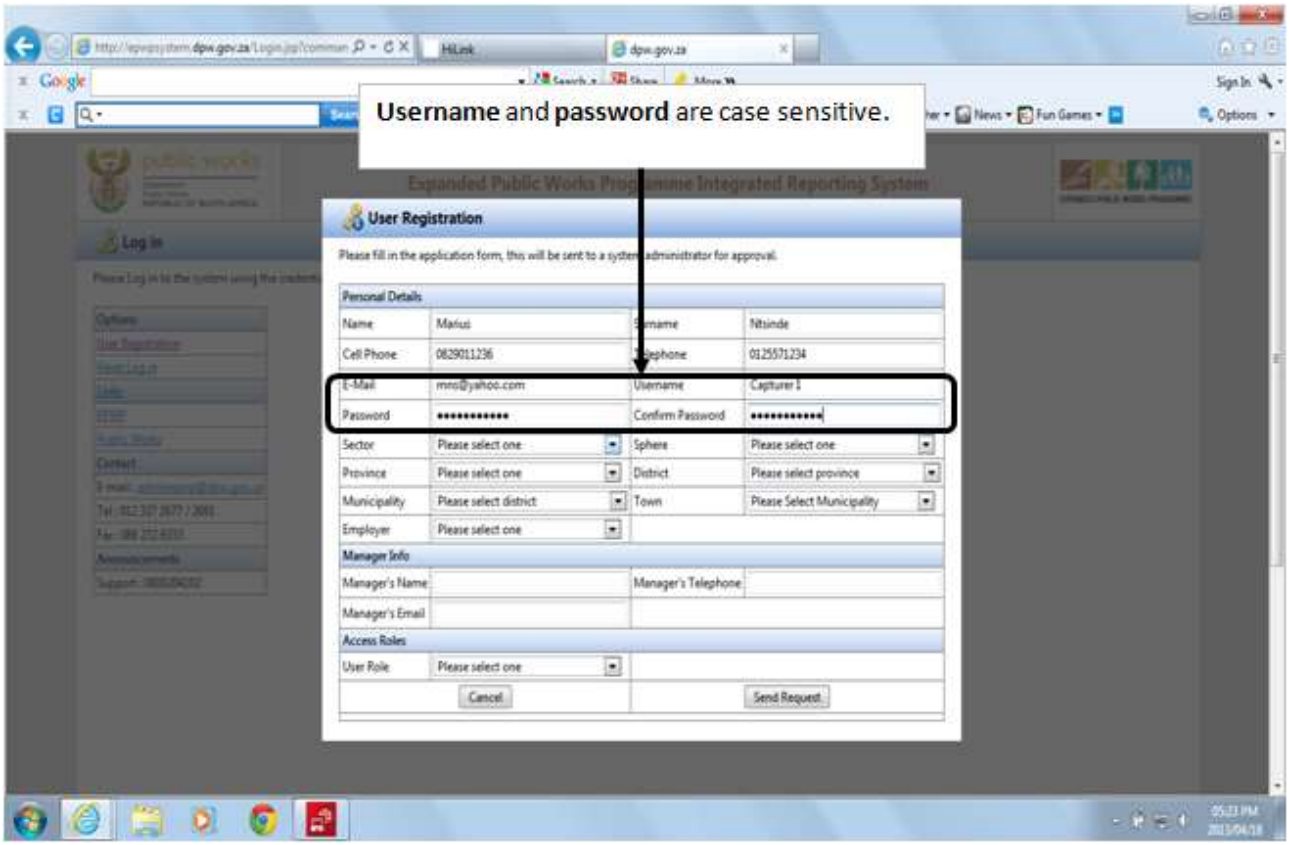
It is incorrect to enter data vertically, from top to bottom.

The Data capturers should pause a bit after selecting from the dropdown. This allows the system to remove data that one is not interested on and avail only the ones to choose from such as sphere, province, district, municipality, town, employer etc:

USERNAME AND PASSWORD ARE CASE SENSITIVE

Users, sometimes struggle to login the system after having entered their 'correct' username and password, because of inconsistencies in format – e.g. capturer 1, instead of Capturer 1.

Figure 8-2: Username and password are case sensitive

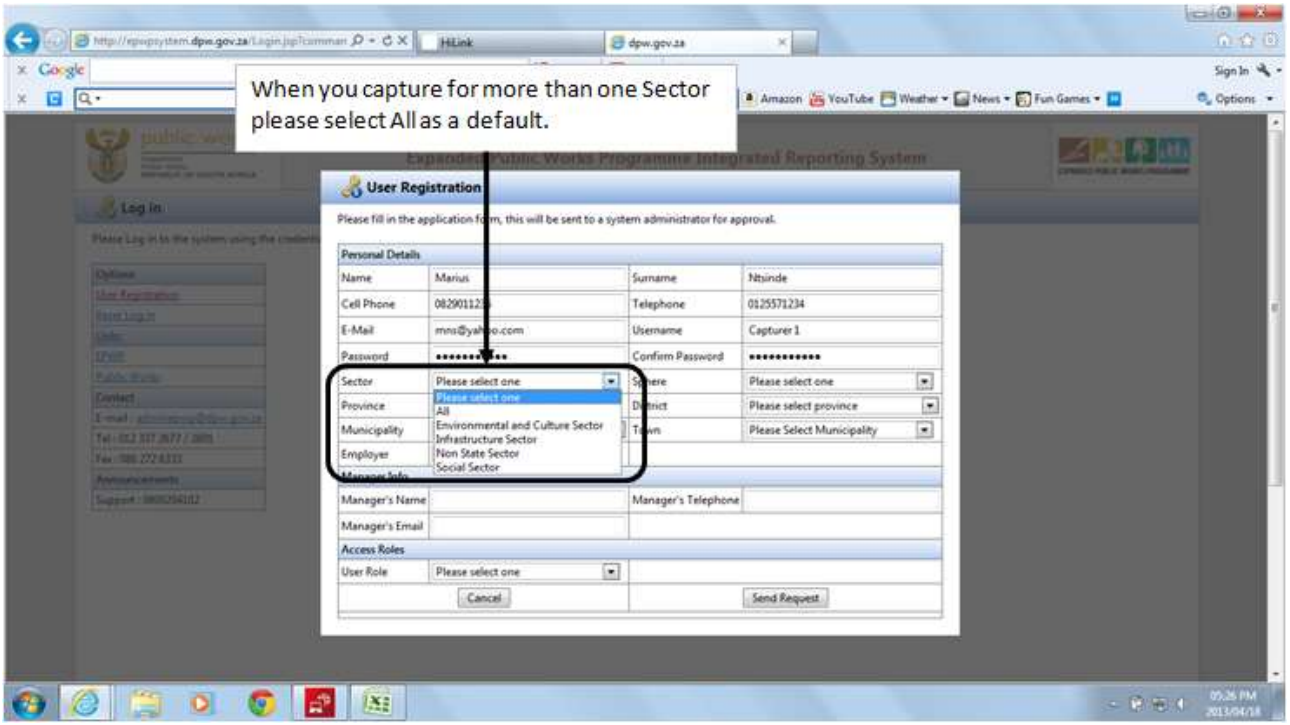


If, as shown in *figure 8-2*, the registered username is Capturer 1, you should not enter capturer 1 or CAPTURER 1, when logging-in – otherwise, the system will consider this as incorrect or an error. Please note that the same level of consistency applies to password, as well.

CAPTURING FOR MORE THAN ONE SECTOR

When you capture or view for more than one sector, please select ***All*** from the dropdown box (see *figure 8-3*).

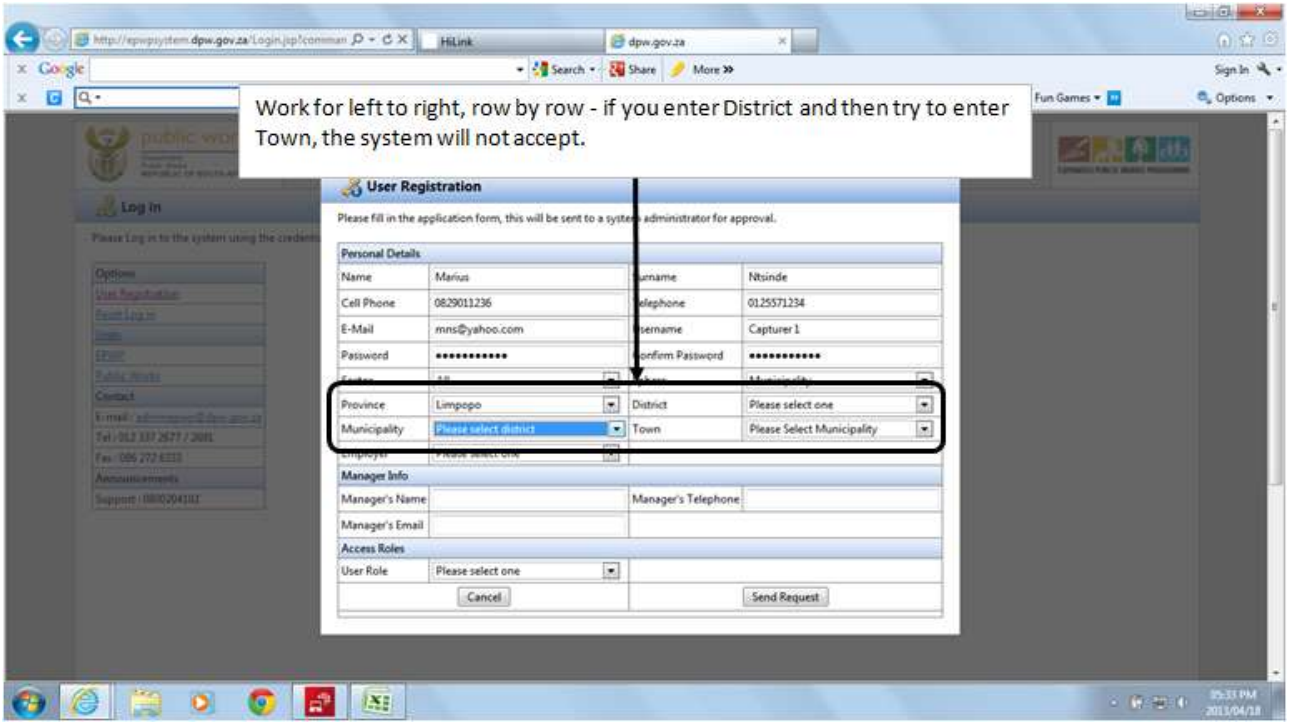
Figure 8-3: Reporting Sector Options



REGISTERING YOUR GEOGRAPHIC LOCATION

As indicated above, users have to enter data into the fields from left to right, row by row.

Figure 8-4: Location hierarchy – Province, District, Municipality and Town

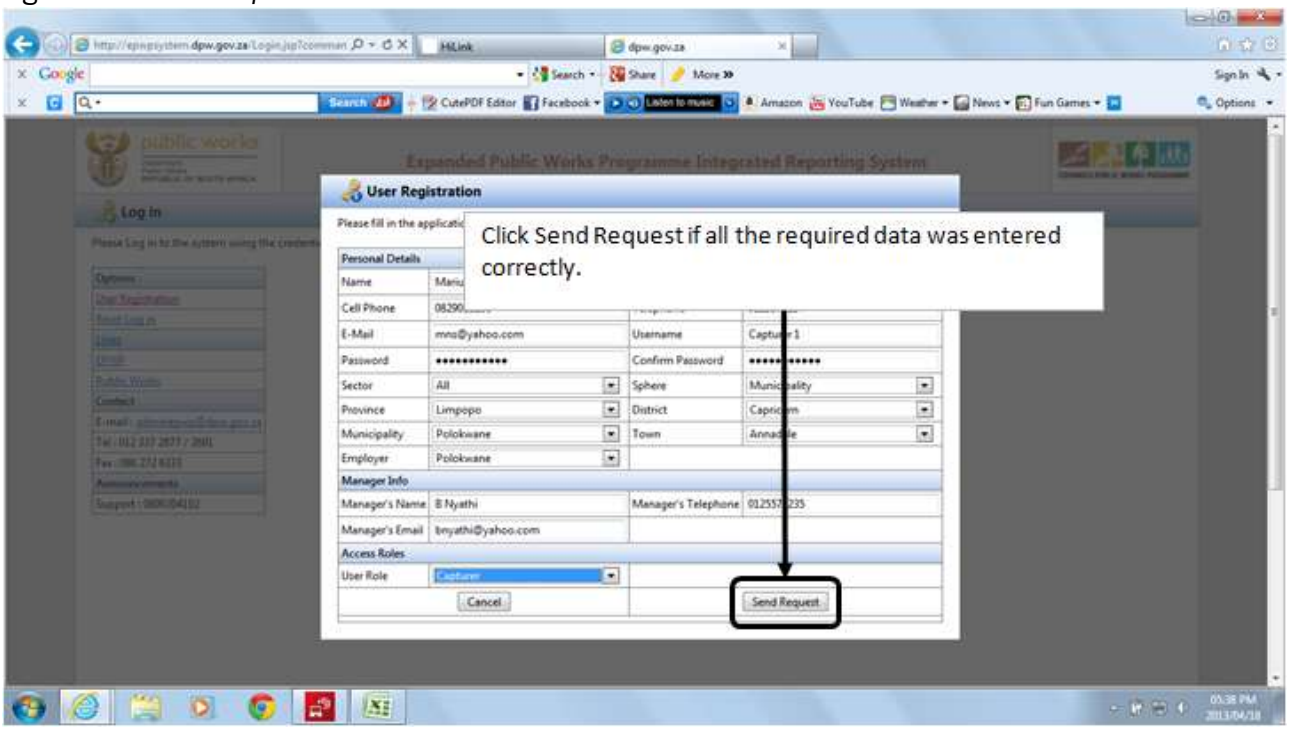


This becomes critical when data for geographic location has to be entered. For example, the system does not allow you to select: (i) Town without first selecting Municipality, (ii) Municipality without first selecting District, and (iii) District without first selecting Province. It is, therefore, important to work sequentially on the system from left to right, row by row.

FINAL STEP

When you have correctly entered the details, click Send Request, otherwise click Cancel or go back to rectify any problem area – the validation error should indicate what requires rectification.

Figure 8-5: Final Steps



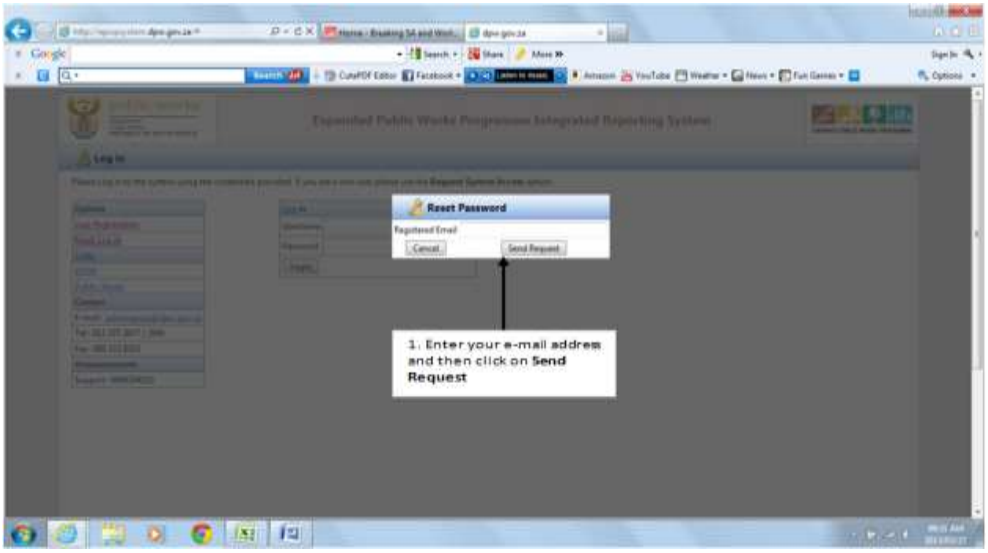
3.3.2 RESET LOGIN

The system allows the user the option to reset password, if and when the user forgets it *(figure 9)*.

Figure 9: Reset password

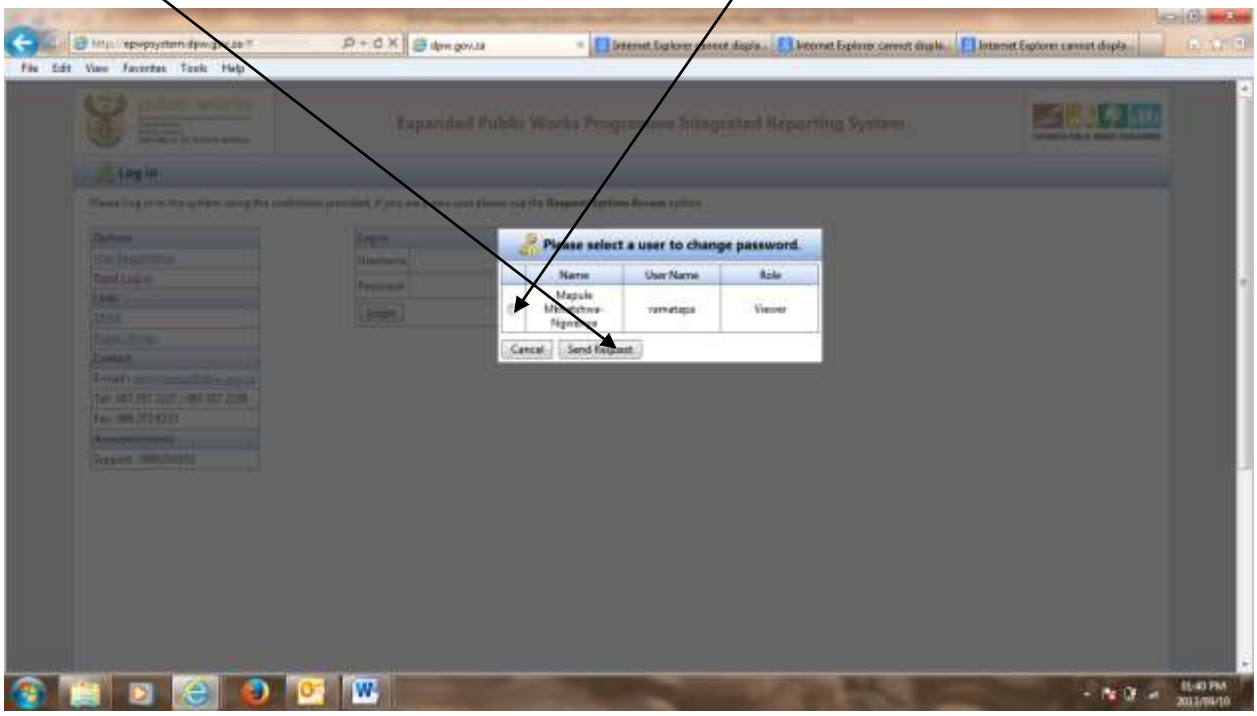
Step 1 of *figure 9*: Click on reset login; the system will take you to a new screen.

In the new screen, *step 2* of *figure 9;* enter the same e-mail address that you submitted in the user registration form in *figure 7* and click Send Request.



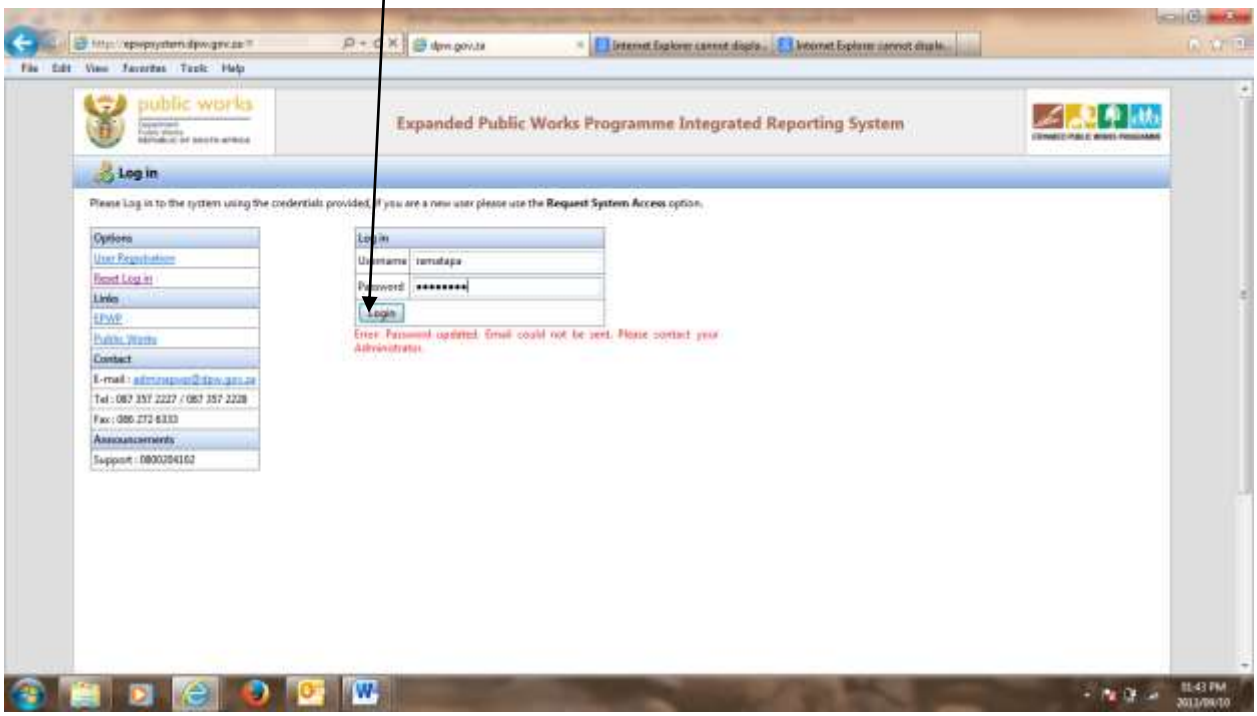
Step 3 of figure 9-1; *Reset password – Select User to change password*

The system will thereafter avail users data, click on the radio button next to it and when highlighted click on Send Request.



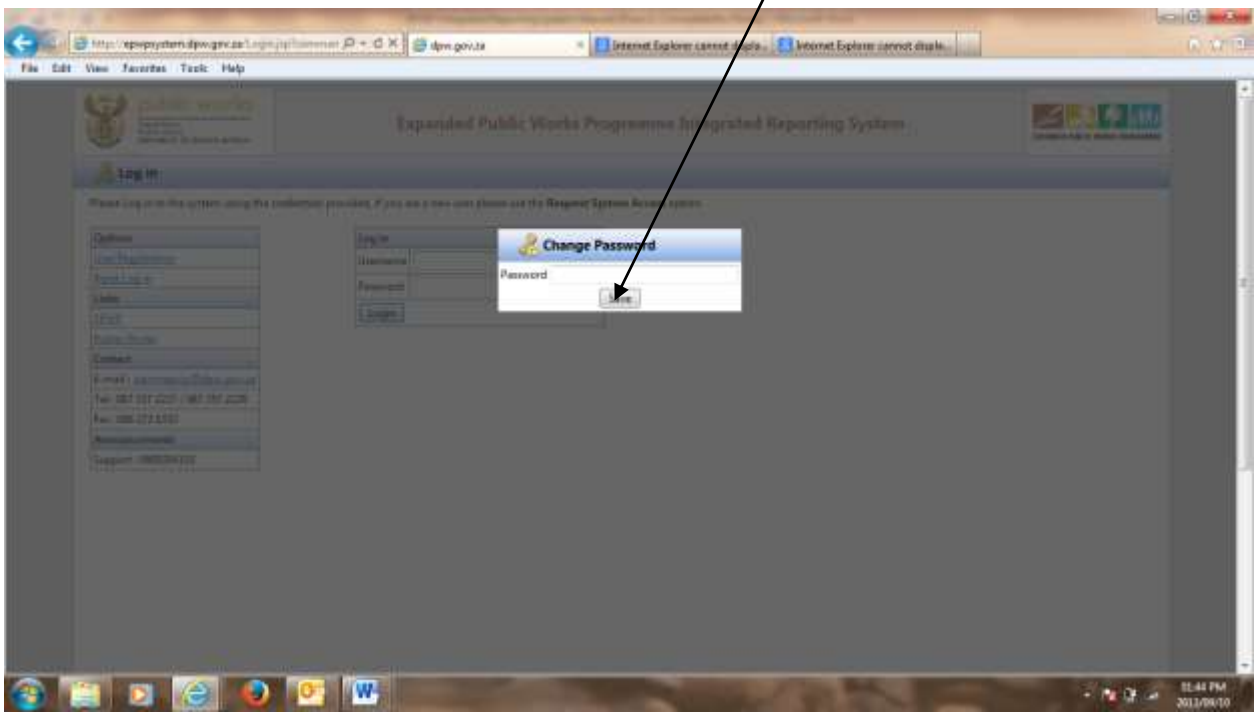
Step 4 of figure 9-1; *Reset password – Activate Reset Login*

Below message in red will appear. Capture username and password by entering the word ***"password"*** on both to activate and click Login.


Expanded Public Works Programme Integrated Reporting System
Log in
Please Log in to the system using the credentials provided. If you are a new user please use the Request System Access option.
Options
User Registration
Reset Log in
Links
EPWP
Public Works
Contact
Announcements
Login
Error: Password updated. Email could not be sent. Please contact your Administrator.

Step 5 of figure 9-1; *Reset password – Change Password*

Below screen an able the user to change password and click *SAVE.*



Thereafter the system will take you to the Home page (figure 11).

3.4 LOG IN AND LOG OUT

Once your username and password has been successfully registered in the system, the registered user can log in and work in the restricted area. Please remember that the system should be accessed through the website http://epwpsystem.dpw.gov.za/ by means of Internet Explorer version 8 and upwards. The system will, thereafter, show the Login page *(figure 10)*.

ALWAYS REMEMBER THAT:

Username and password are case sensitive. If you enter your username as Username100, the system will not accept USERNAME100 or username100 or Usernameoo1, when you login – the system will only accept Username100.

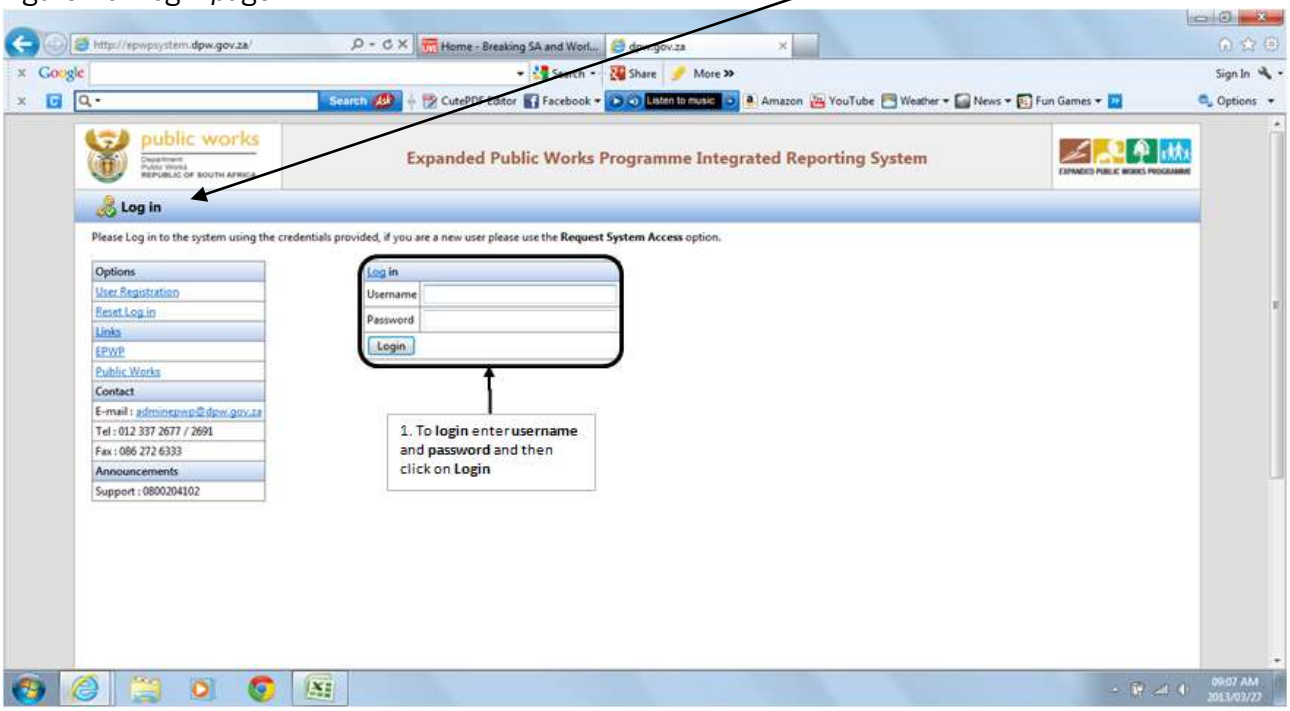
The same applies to password.

Also note that all data fields are compulsory, except for the cell phone number field under the Personal details section. In other words, all compulsory fields need to have been filled before clicking Send Request.

3.4.1 Login

Step 1, figure 10: To login enter your Username followed by your Password and then click Login – *figure 10:* **Login page**.

Figure 10: Login page


Expanded Public Works Programme Integrated Reporting System
Log in
Please Log in to the system using the credentials provided, if you are a new user please use the Request System Access option.
Options
User Registration
Reset Log in
Links
EPWP
Public Works
Contact
E-mail : adminepwp@dpw.gov.za
Tel : 012 337 2677 / 2691
Fax : 086 272 6333
Announcements
Support : 0800204102
Log in
Username
Password
Login
1. To login enter username and password and then click on Login

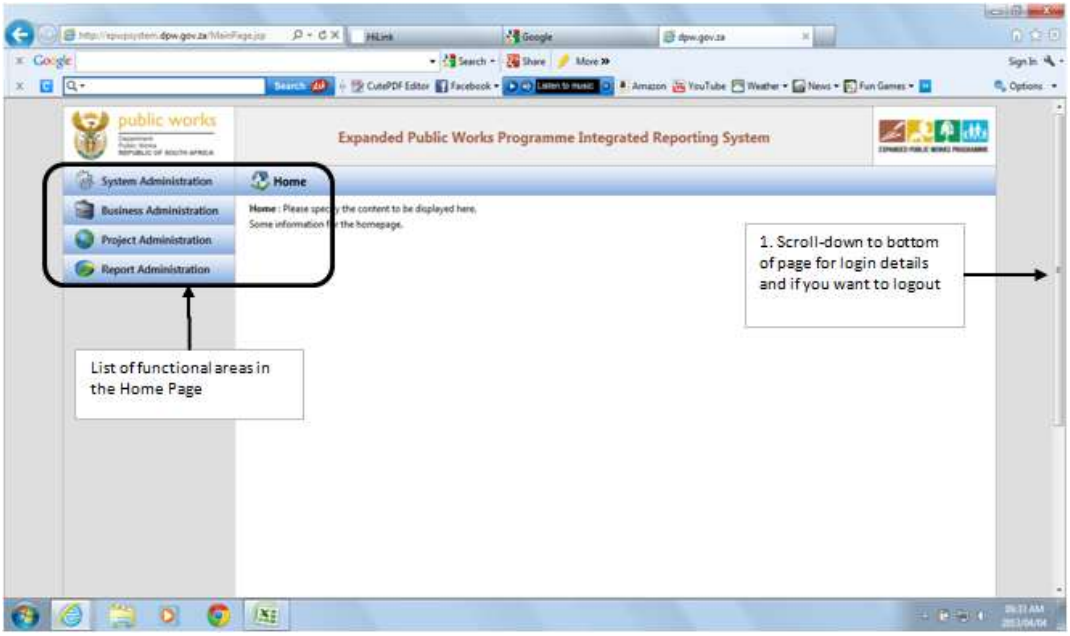
Thereafter the system will take you to the **Home page** (*figure 11).*

When you click on the System Administration tab on the left-hand side of the **Home page** screen, the system will close the sub-headings, Home and My Profile, under the System Administration functional area to show the other three functional areas – Business Administration, Project Administration and Report Administration *(figure 11 – left-hand side screen).*

3.4.2 Log Out

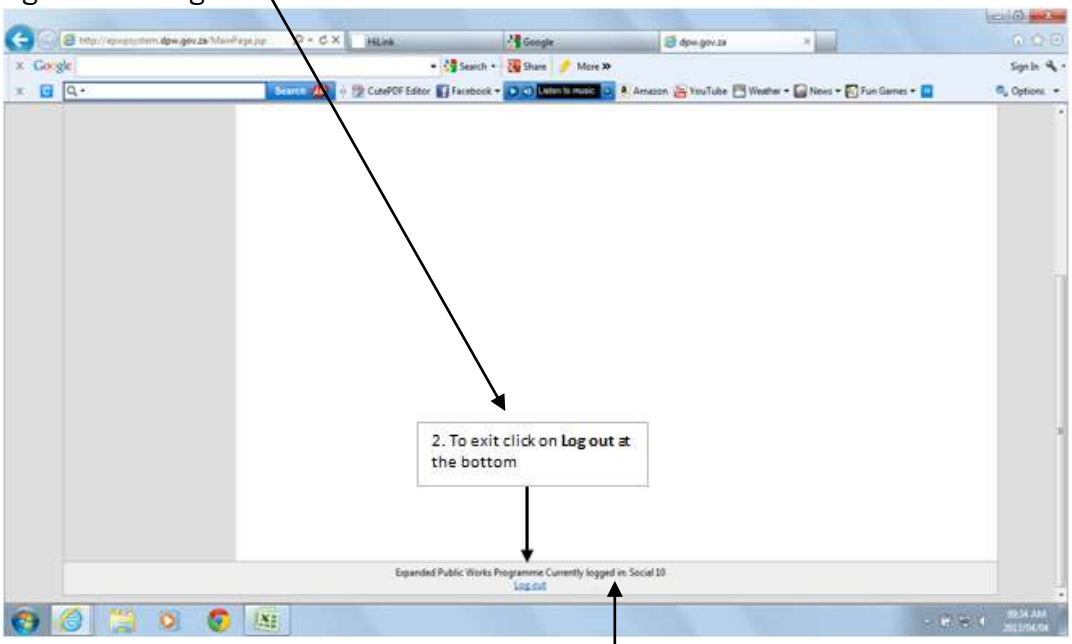
To login, enter your Username followed by your Password and then click Login – *figure 10:* ***Login page***.

Figure 11: The Functional Areas in the Home page


Expanded Public Works Programme Integrated Reporting System
System Administration
Business Administration
Project Administration
Report Administration
Home
1. Scroll-down to bottom of page for login details and if you want to logout
List of functional areas in the Home Page

If you, however, wish to **log out**, scroll down *(step 1 of figure 11)* to the bottom of the screen. Once at the **bottom of the screen**, you can click on Log out – the Log out function is available in all the pages of the system once you are in the restricted area.

Figure 11-1: Log out function



Please note that the system indicates the **Username of the person who is currently logged in**.

SECTION 4: SYSTEM ADMINISTRATION

4.1 Overview

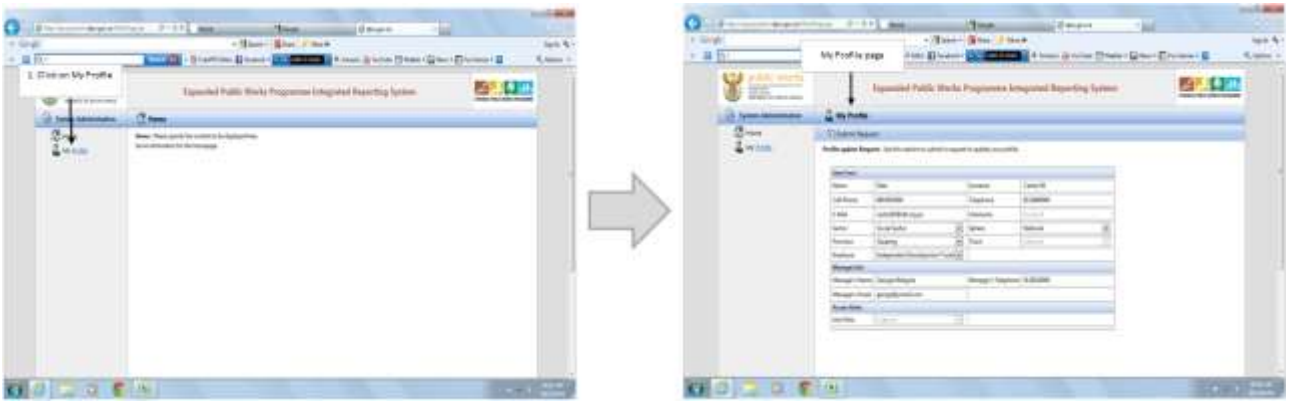
Users are permitted access and functionality on the system according to Access Role they have assigned for themselves during the User Registration stage, before they are able to Log in. In System Administration all three user categories can view and make changes to their personal details.

4.1.1 MY PROFILE

For the user who is registered as a capturer, under the System Administration section *(figure 12)* you will find the following sub-headings.

- Home
- My Profile

Figure 12: The Home page – System Administration and My Profile



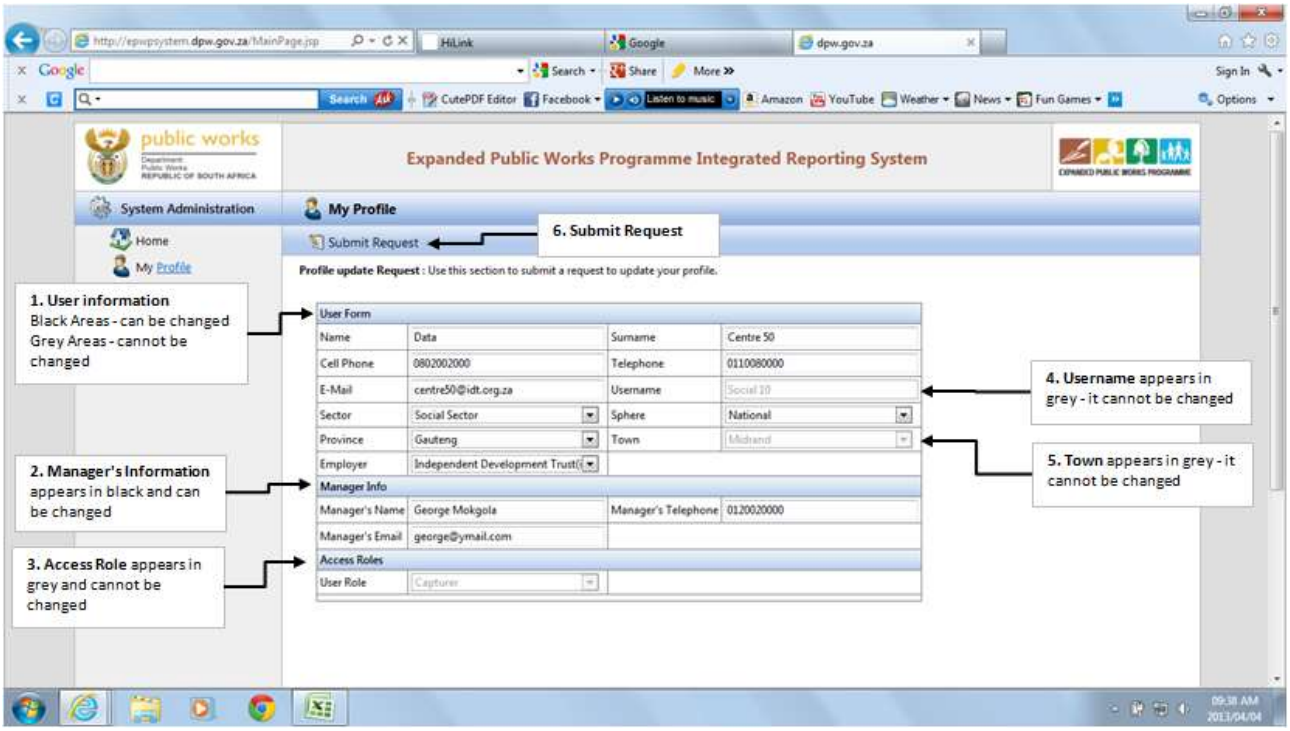
The system defaults to the Home page, the user has to click '**My Profile**' to view the details of his/her registered profile *(figure 12)*.

Figure 13 shows, under '**My Profile**', the details of the user that is currently logged on – these details were entered during the profile registration stage.

If you wish to make changes to your personal details, you can only make changes in the fields that are in a black font only – the fields that appear in the grey font can only be changed with permission of the system administrator.

Once changes have been made to personal details, the capturer, viewer or authoriser can submit changes by clicking on Submit Request – *step 6* of *figure 13*.

Figure 13: System Administration – My Profile



Thereafter, wait for a response from the system.

SECTION 5: BUSINESS ADMINISTRATION

This section of the system is about the processes involved in the bulk uploading of beneficiary employment and training data. The process of bulk uploading is particularly useful when a large number of beneficiaries have to be captured.

The section is divided into sub-sections that help demonstrate the different steps that form part of the entire bulk uploading process:

- Accessing the Excel spreadsheet from the system to populate a large number of beneficiaries
- Enabling the macros to activate the validation rules of the Excel spreadsheet
- Simple manner of confirming that the macros have been enabled
- Capturing employment and training data of the beneficiaries and where to find:
    - The Project Code
    - The Implementing Body
    - The Course Code
    - The Training Service Provider
- Uploading the populated Excel spreadsheet:
    - Retrieving the saved Excel spreadsheet file
    - Uploading the Excel spreadsheet file
- Confirming a successful bulk upload process

The sections that follow outline the way in which the uploading process has to be undertaken.

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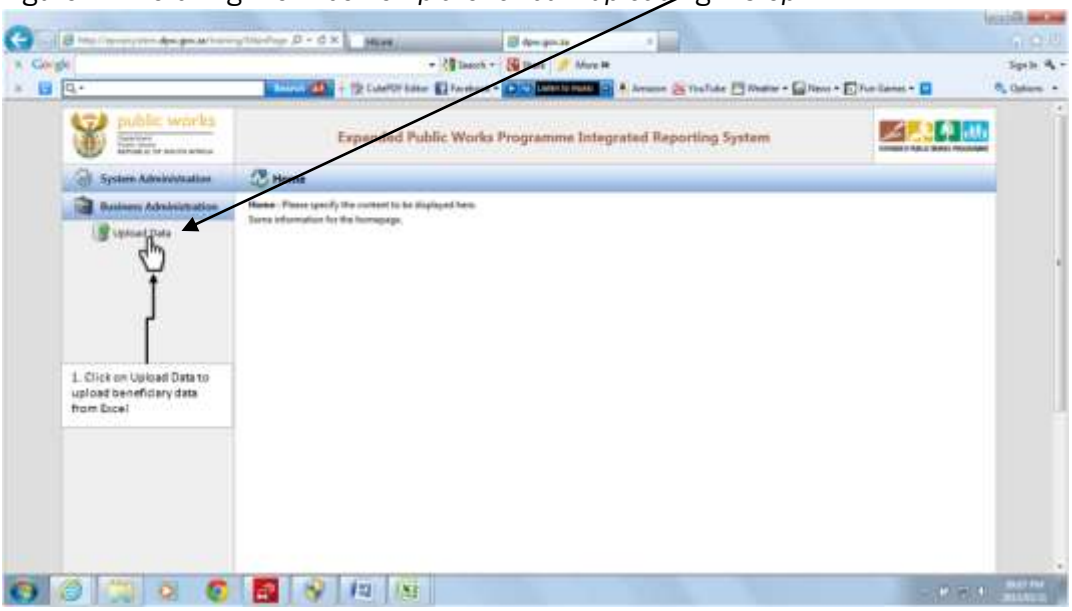
5.1 Accessing the Excel template

5.1.1 RETRIEVING THE TEMPLATE

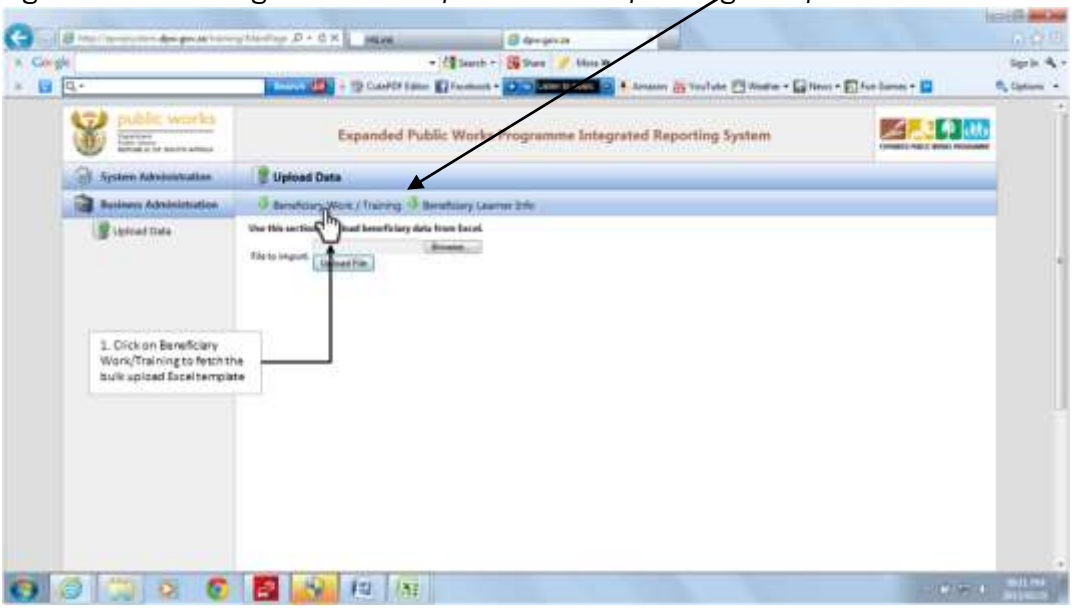
To retrieve the Excel template for the bulk upload process click **Upload Data**.

Figure 14: Fetching the Excel template for bulk uploading – step 1


Expanded Public Works Programme Integrated Reporting System
System Administration
Business Administration
Upload Data
1. Click on Upload Data to upload beneficiary data from Excel

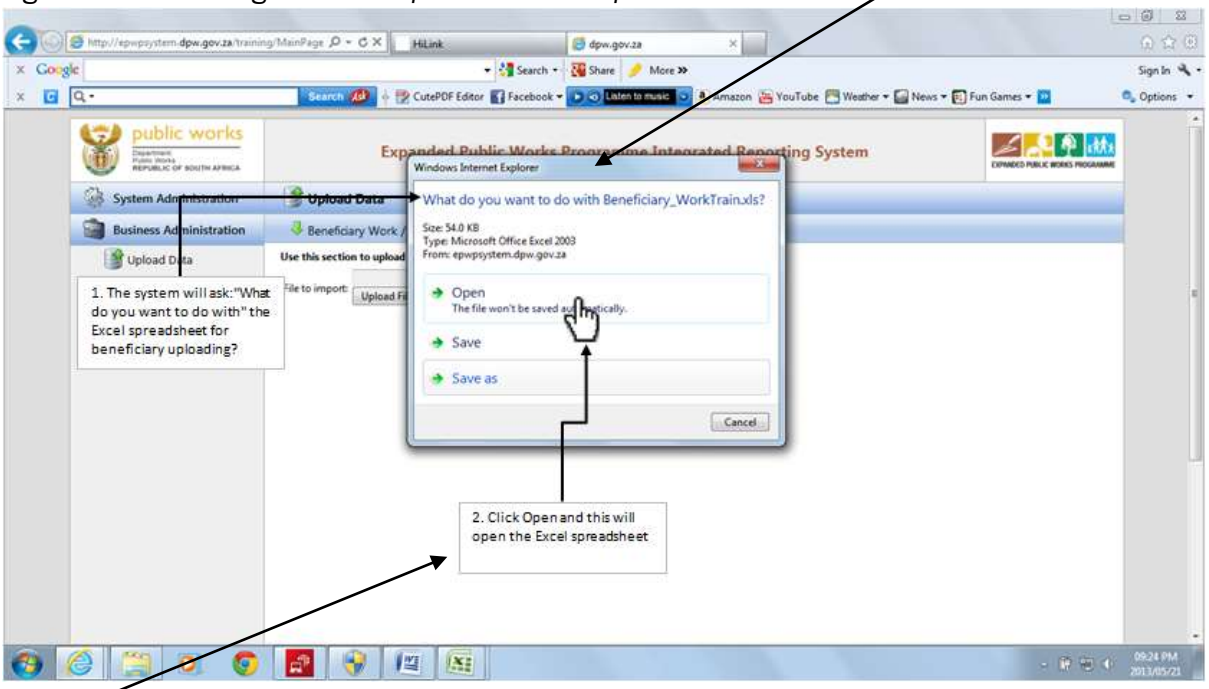
The system will open the Upload Data section and then **click Beneficiary Work/Training** to fetch spreadsheet.

Figure 14-1: Fetching the Excel template for bulk uploading – step 2


Expanded Public Works Programme Integrated Reporting System
System Administration
Business Administration
Upload Data
Beneficiary Work / Training
Beneficiary Learner Info
1. Click on Beneficiary Work/Training to fetch the bulk upload Excel template

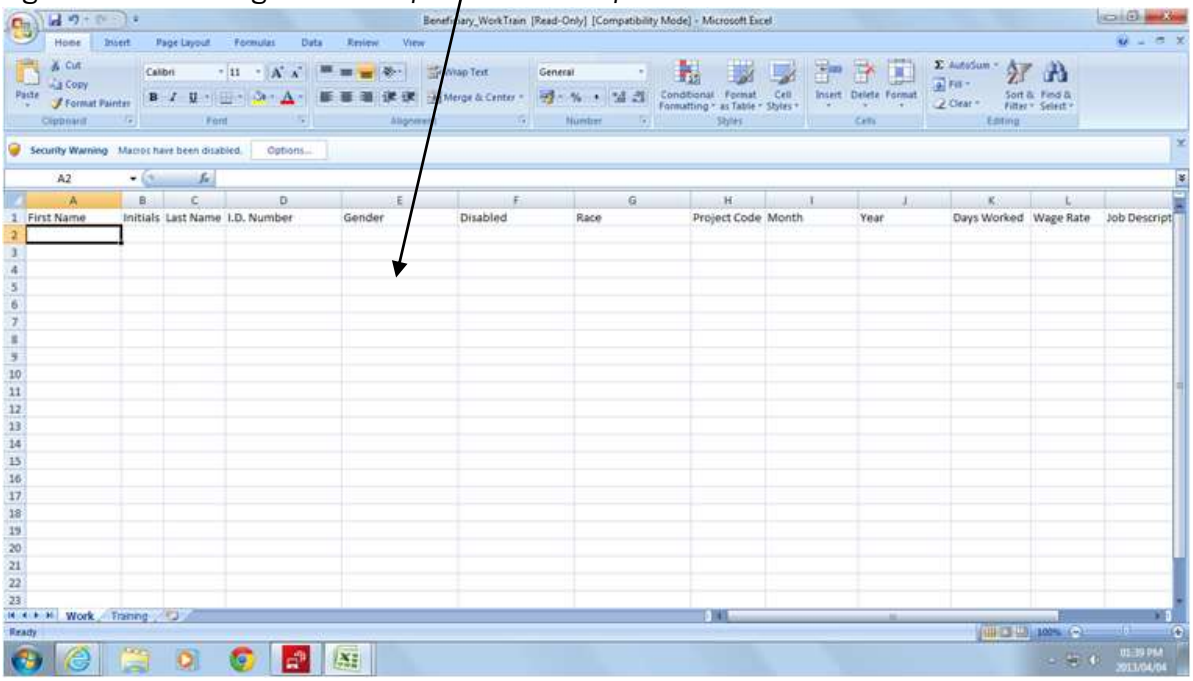
Thereafter, a Windows Internet Explorer pop-up window will ask if you want to **Open or Save** the Excel template.

Figure 14-2: Fetching the Excel Spreadsheet Template


1. The system will ask: "What do you want to do with" the Excel spreadsheet for beneficiary uploading?
Windows Internet Explorer
What do you want to do with Beneficiary_WorkTrain.xls?
Size: 54.0 KB
Type: Microsoft Office Excel 2003
From: epwpsystem.dpw.gov.za
Open
Save
Save as
Cancel
2. Click Open and this will open the Excel spreadsheet

Click Open and the spreadsheet will open.

Figure 14-3: Fetching the Excel Spreadsheet Template



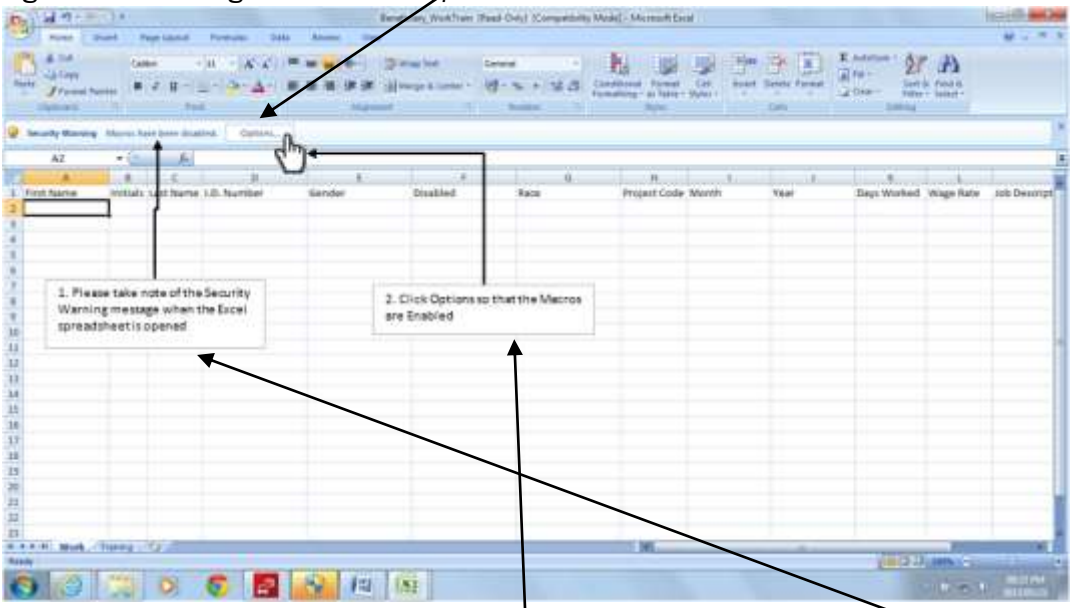
The beneficiary data that the user uploads in this section is for projects that are already captured and are in the system. NB: It should be noted that the system will only bulk upload beneficiary data captured on the above shown template. Where there are dropdowns such in Colum E to G and I, users should use

it and avoid retyping as a font might mistakenly change and hinder bulk uploading process. Changes on beneficiary template such as adding of lines etc should be prohibited as it affects built in validations.

5.1.2 ACTIVATING MACROS IN THE SPREADSHEET

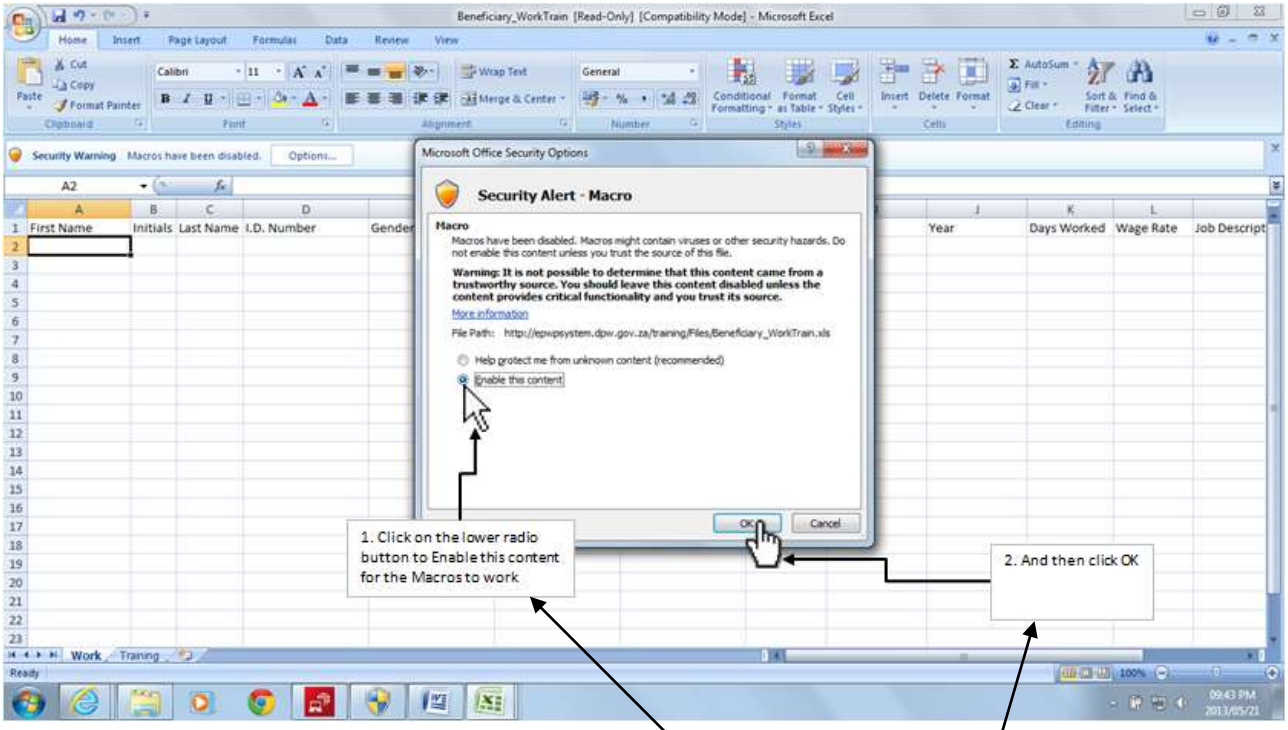
Once the Excel spreadsheet is open, you have to activate the Macros so that the validation rules of the template are functional.

Figure 15: Enabling Macros in the spreadsheet


1. Please take note of the Security Warning message when the Excel spreadsheet is opened
2. Click Options so that the Macros are Enabled

The validation rules will continually check that data entered into the spreadsheet falls in the appropriate parameters defined by the system for beneficiary data. Do this when according to step 1, the macros have been disabled. Thereafter click on Options.

Figure 15-1: Enabling Macros in the spreadsheet

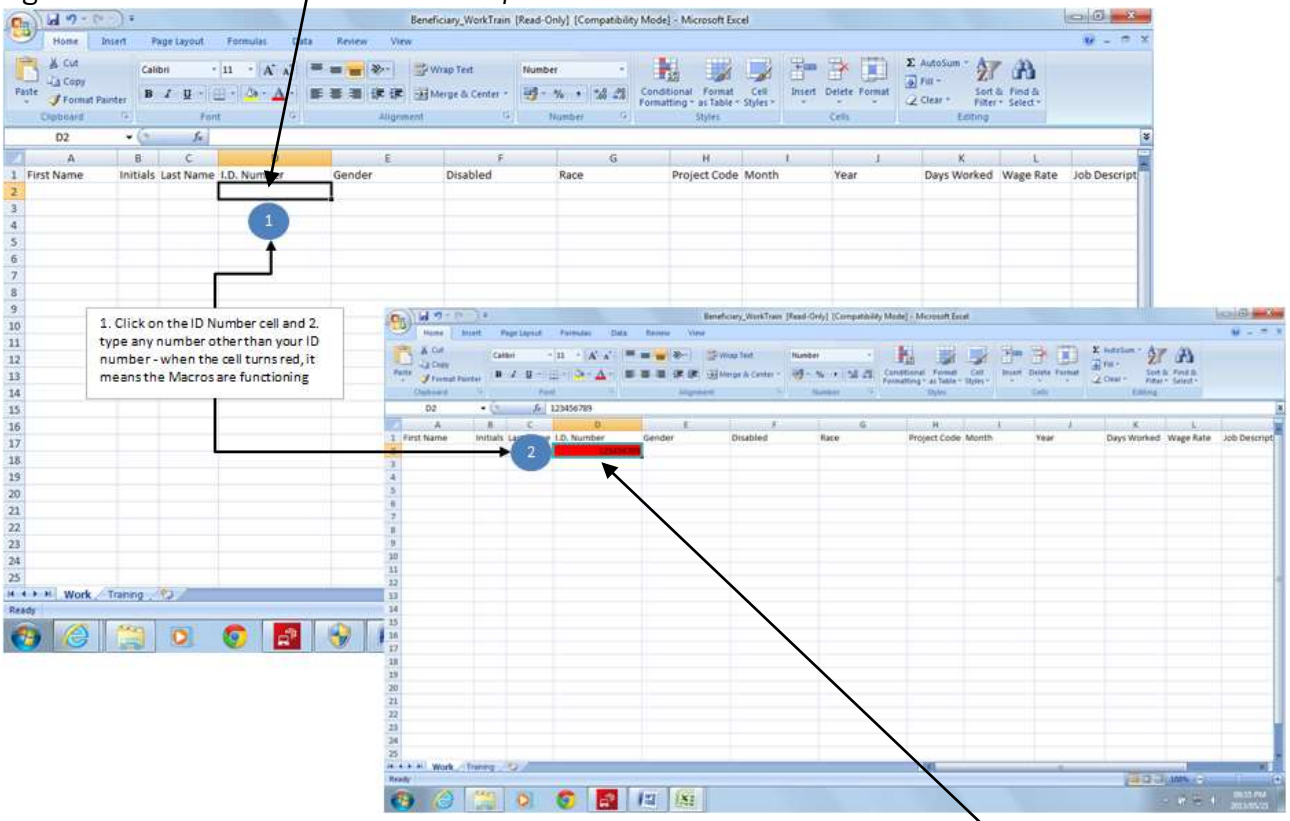

Beneficiary_WorkTrain [Read-Only] [Compatibility Mode] - Microsoft Excel
Security Warning Macros have been disabled. Options...
Microsoft Office Security Options
Security Alert - Macro
Macro
Macros have been disabled. Macros might contain viruses or other security hazards. Do not enable this content unless you trust the source of this file.
Warning: It is not possible to determine that this content came from a trustworthy source. You should leave this content disabled unless the content provides critical functionality and you trust its source.
More information
File Path: http://epwpsystem.dpw.gov.za/training/Files/Beneficiary_WorkTrain.xls
Help protect me from unknown content (recommended)
Enable this content
OK
Cancel
1. Click on the lower radio button to Enable this content for the Macros to work
2. And then click OK

When this opens the options pop-up box, click on enable the macros and then click OK.

5.1.3 CONFIRM ACTIVATION OF THE MACROS IN THE SPREADSHEET

To test if the spreadsheet's validation rules are fully operational, move the mouse pointer over the ID number cell (D2) and click in it.

Figure 16: Check if validation rules are operational

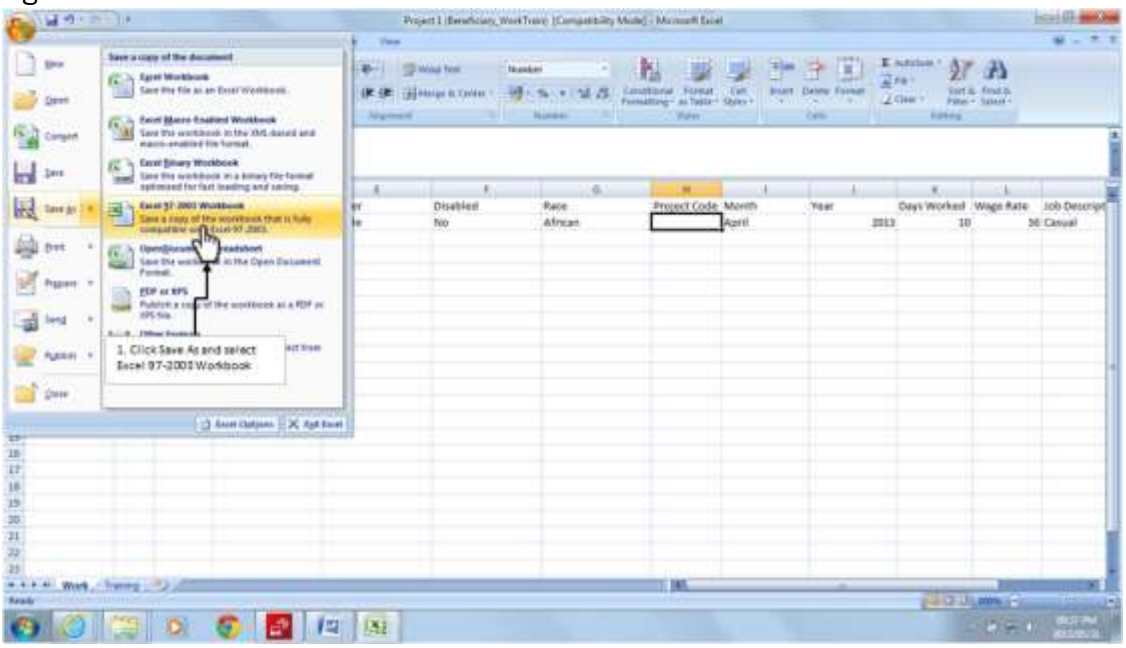

1. Click on the ID Number cell and 2. type any number other than your ID number - when the cell turns red, it means the Macros are functioning
1
2

Type your cellphone number or your work telephone number. Once the cell turns red, it means that the validation rules are fully operational, because only South African ID numbers are supposed to be entered in that cell.

5.1.4 SAVE THE SPREADSHEET AS EXCEL 97-2003 WORKBOOK

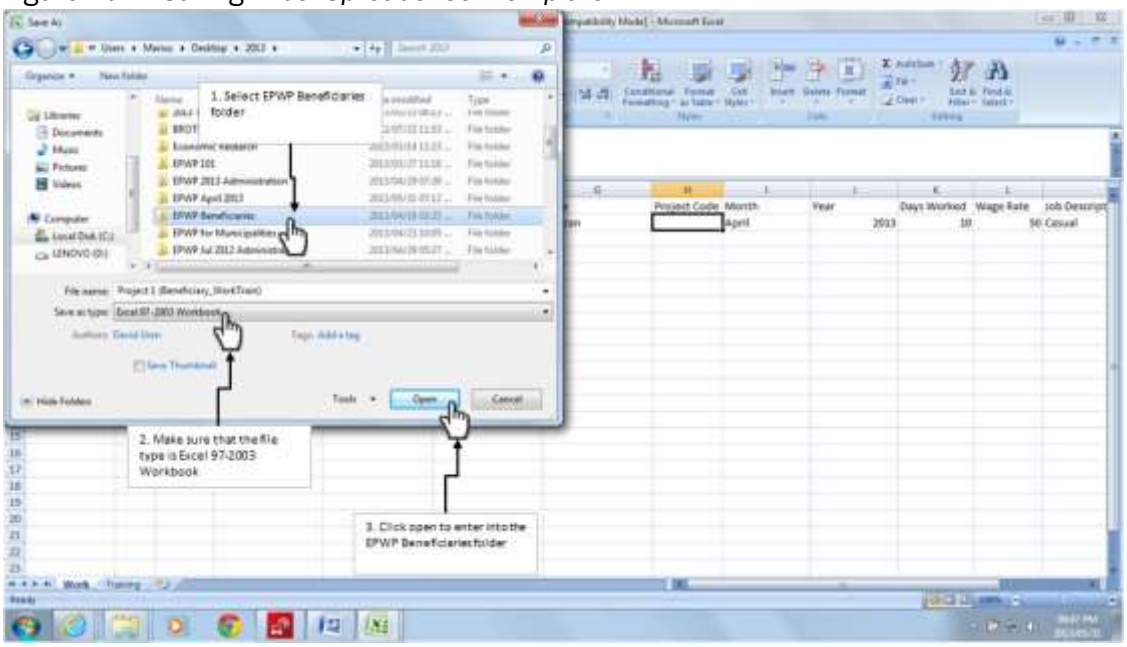
Once the above tests have been completed, save the spreadsheet. Click Save As, and then select the Excel 97-2003 Workbook option.

Figure 17: Save as Excel 97-2003 Workbook



Save the file under an appropriate EPWP Beneficiaries' folder.

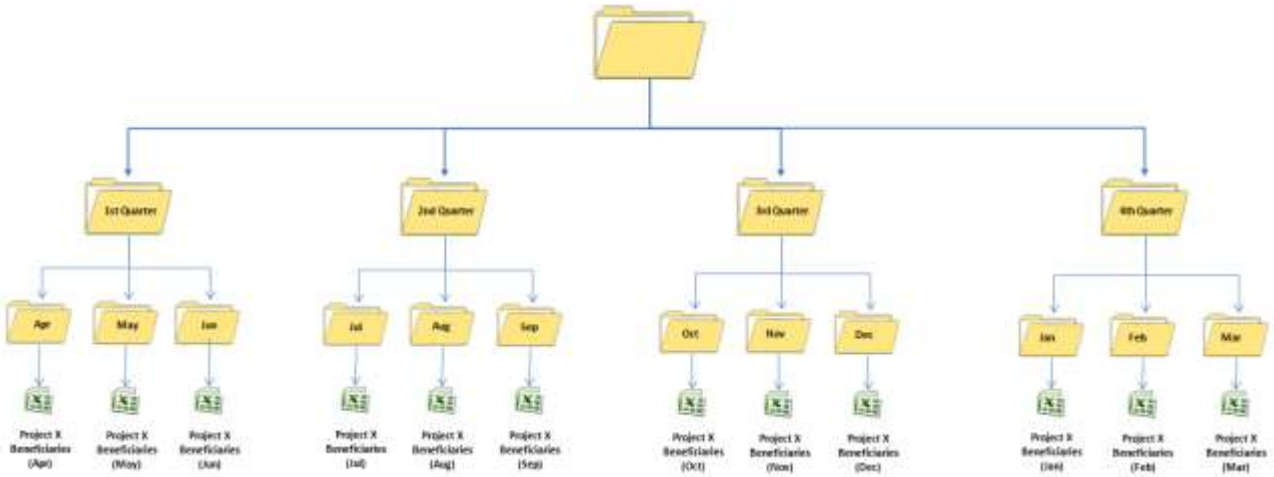
Figure 17-1: Saving Excel Spreadsheet Template


1. Select EPWP Beneficiaries folder
2. Make sure that the file type is Excel 97-2003 Workbook
3. Click open to enter into the EPWP Beneficiaries folder

Make sure that there are monthly sub-folders, as shown below.

Save your populated beneficiaries' employment and training data file in a convenient location within a monthly folder system that would help save time for easily retrieval.

Figure 17-2: EPWP Beneficiaries sub-folders

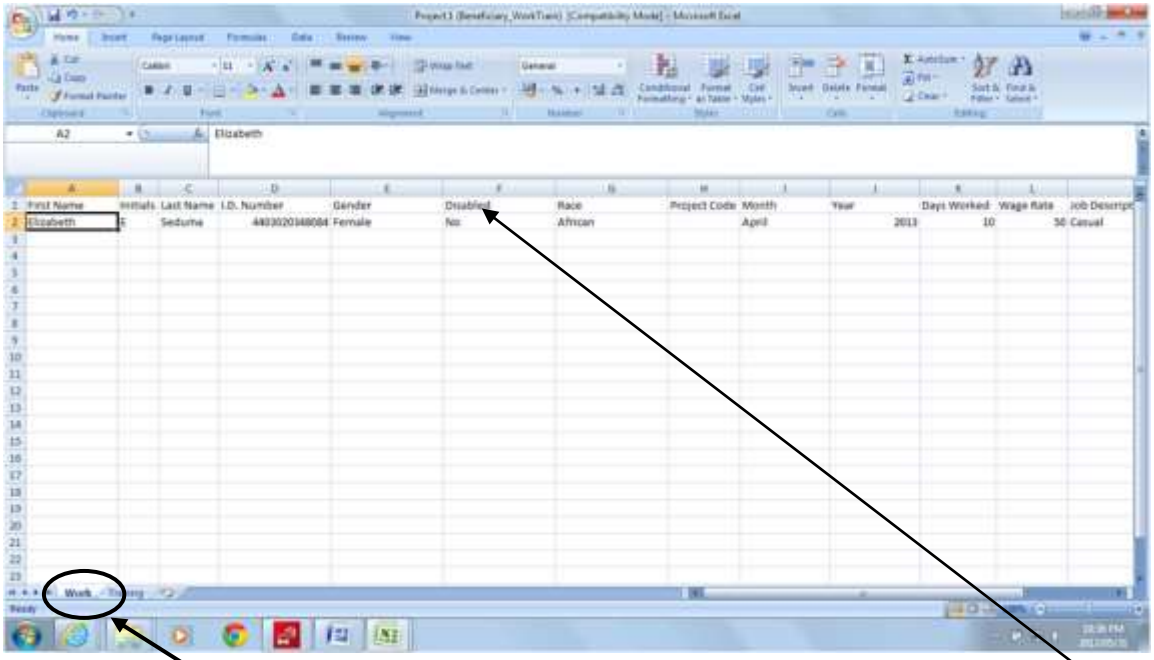


5.2 Capturing beneficiary data in Excel template

5.2.1 EMPLOYMENT DATA

In this section we show how to capture beneficiary employment data on the Excel spreadsheet – this is the same spreadsheet that you downloaded from the system.

Figure 18: Populating beneficiary data in the Excel spreadsheet



To capture employment data of beneficiaries on the Excel template make sure that the **'Work'** worksheet, for employment, is open. The 'Work' or employment worksheet has the following headings:

EMPLOYMENT WORKSHEET

First Name	Initials	Last Name	I.D. Number	Gender	Disabled	Race	Project Code	Month	Year	Days Worked	Wage Rate	Job Description

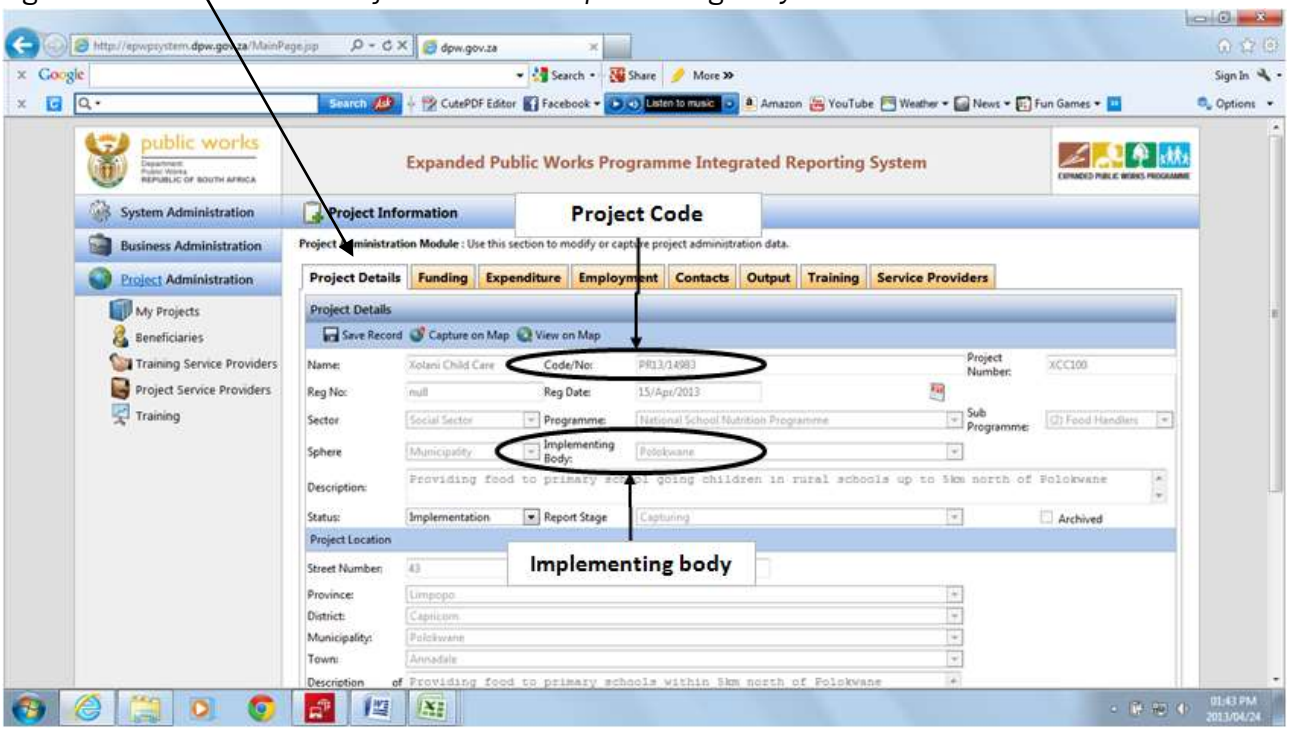
Enter the details of each beneficiary according to these headings:

- First Name – Type name of beneficiary in
- Initials – Type initials
- Last Name – Type surname of beneficiary
- ID Number – Type ID number
- Gender – Select from dropdown box
- Disabled – Select option from dropdown box
- Race – Select from dropdown box
- Project Code – Type relevant project code
- Month – Select month from dropdown box
- Year – Type year
- Days Worked – type number days worked in the selected month
- Wage Rate – type daily wage rate
- Job Description – type job description

Always Remember

To successfully upload an Excel template that is populated with beneficiary data, ensure that the correct project code and implementing body are entered. You will find a Project Code and Implementing Body in Project Details of Project Information, once project details have been successfully captured.

Figure 18-1: Where to find Project Code and Implementing Body

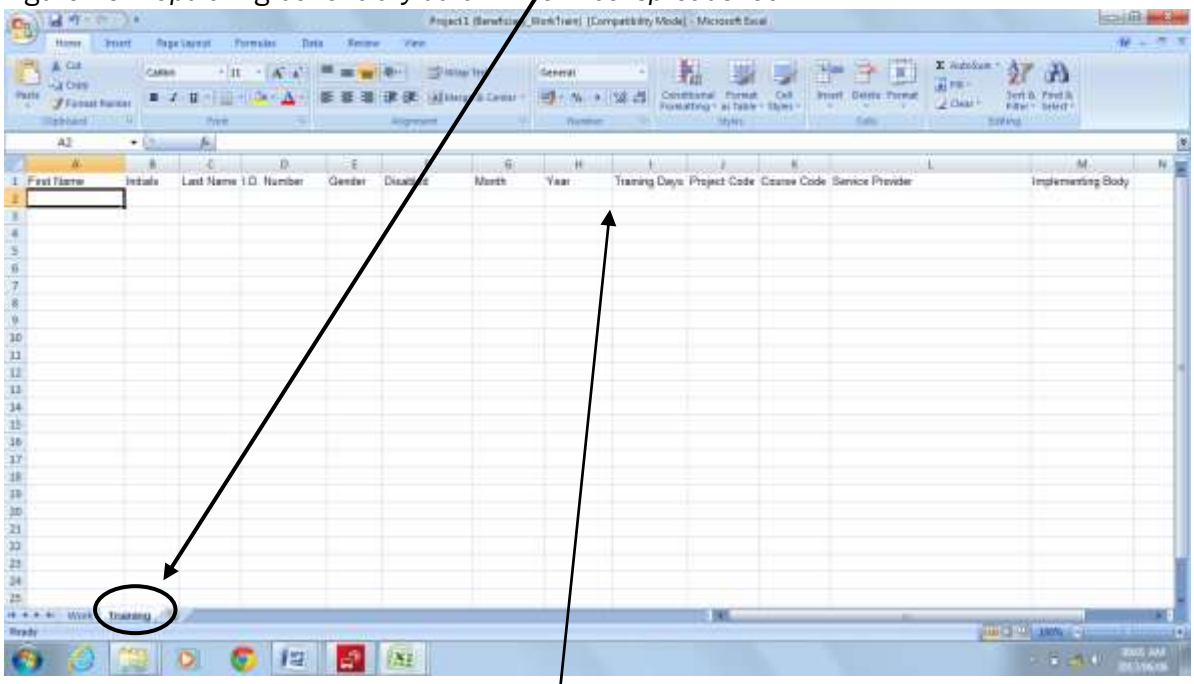


In this case Project Code is PR13/14983 and Implementing Body is Polokwane. Please make sure that you retain the format (PR13/14983 and not pr13/14983) for project code when you enter it into the Excel spreasheet field, otherwise it will not upload.

5.2.2 TRAINING DATA

In this section we show how to capture beneficiary training data on the Excel spreadsheet – this is the same spreadsheet that you downloaded from the system. To capture training data of beneficiaries in the Excel template, make sure that the **'Training'** worksheet is active. .

Figure 19: Populating beneficiary data in the Excel spreadsheet



The 'Training' worksheet has the following headings:

TRAINING WORKSHEET

First Name	Initials	Last Name	I.D. Number	Gender	Disabled	Month	Year	Training Days	Project Code	Course Code	Service Provider	Implementing Body

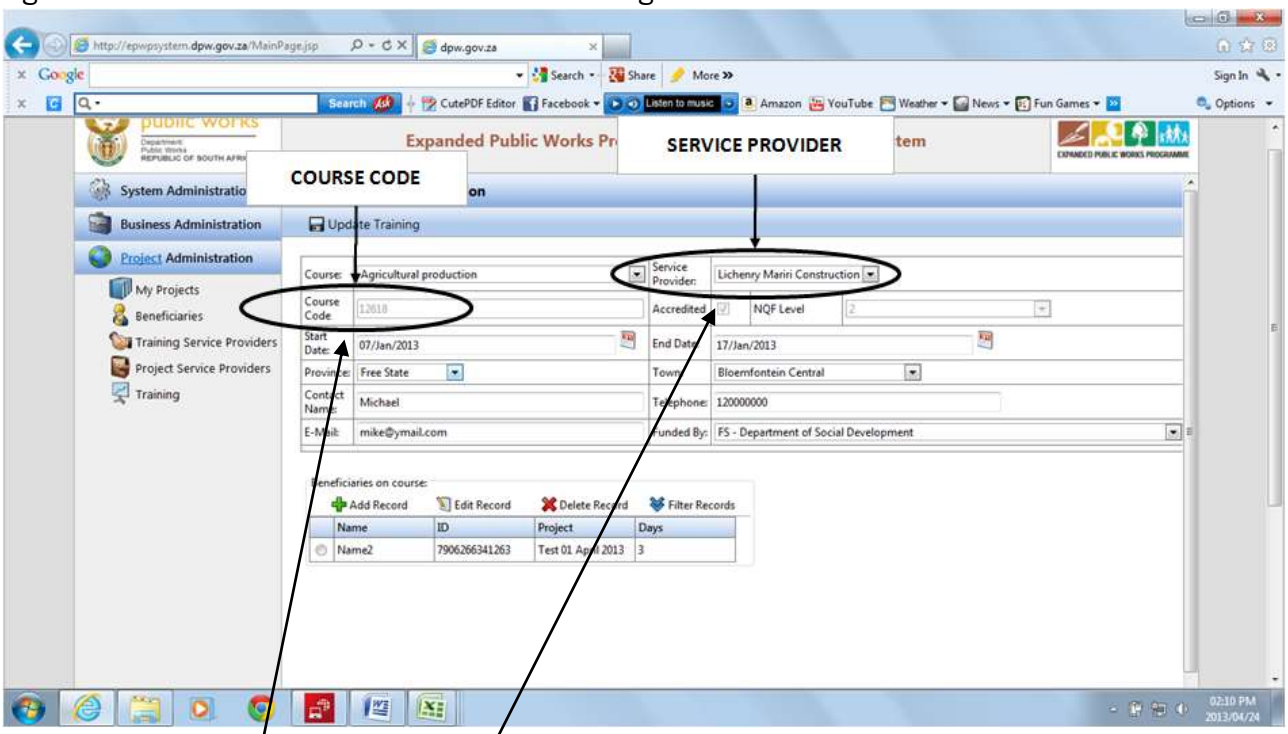
Enter beneficiary data according to these headings:

- First Name – Enter first name
- Initials – Enter initials
- Last Name – Enter last name
- ID Number – Enter ID number
- Gender – Select gender from dropdown menu
- Disabled – Select option from dropdown box list
- Month – Select from dropdown box list
- Year – Enter year
- Training Days – Enter days
- Project Code – Enter relevant project code
- Course Code – Enter relevant course code
- Service Provider – Enter relevant training service provider
- Implementing Body – Enter relevant implementing body

Always Remember

To successfully upload an Excel template that is populated with beneficiary data ensure that, in addition to a correct project code, a correct **Course Code**, **Training Service Provider** and **Implementing Body** have been entered. Course code and service provider are found under the training administration section.

Figure 19-1: Where to find Course Code and Training Service Provider



In this case, the:

Course Code is **12618**

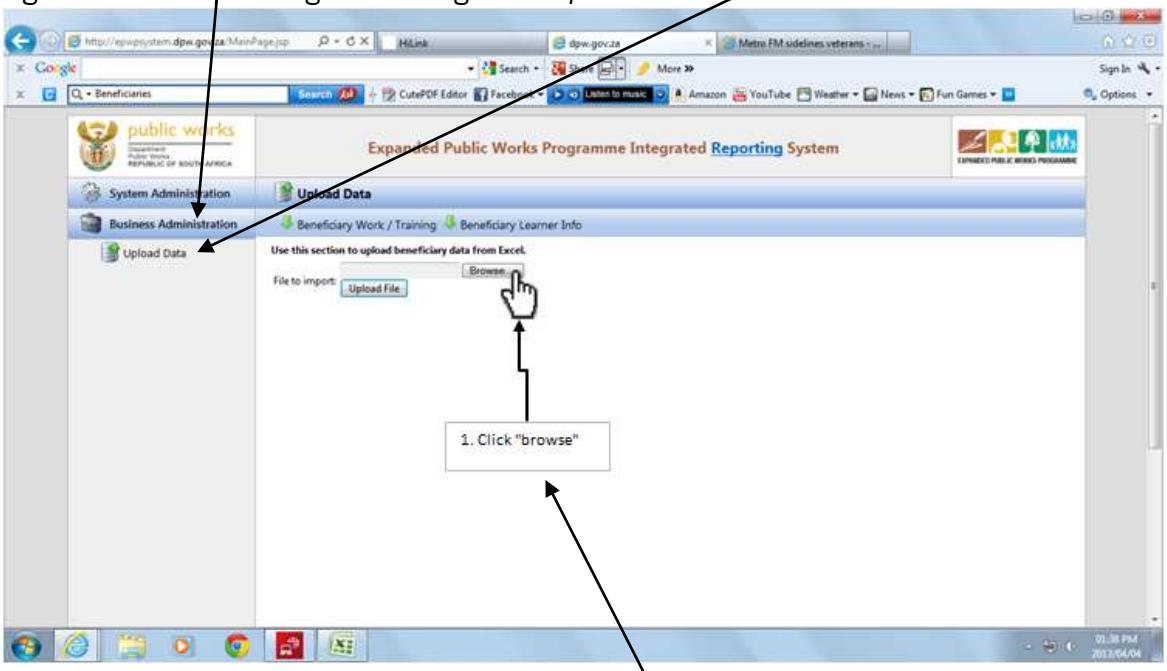
Service Provider is **Lichenry Mariri Construction**

5.3 Uploading

5.3.1 Retrieving the saved Excel template

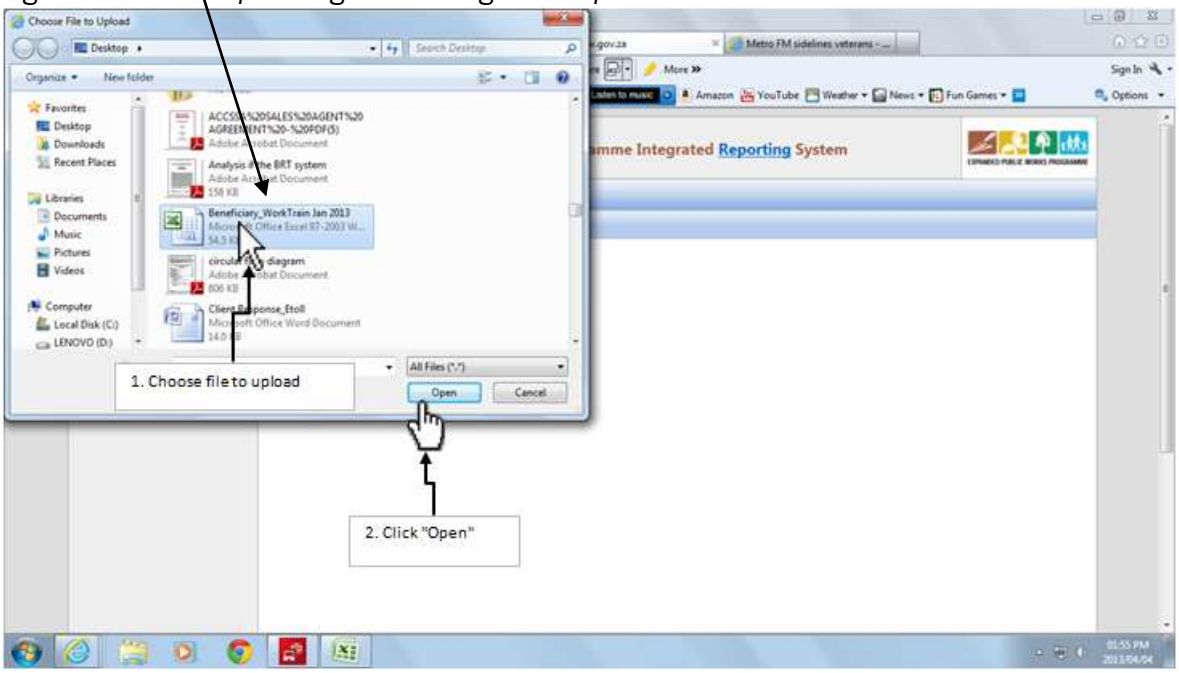
To retrieve the saved beneficiary data in the Excel Template, click on the Business Administration tab. Once the Business Administration functional area is open, click on 'Upload Data'.

Figure 20: Bulk uploading – retrieving file to upload



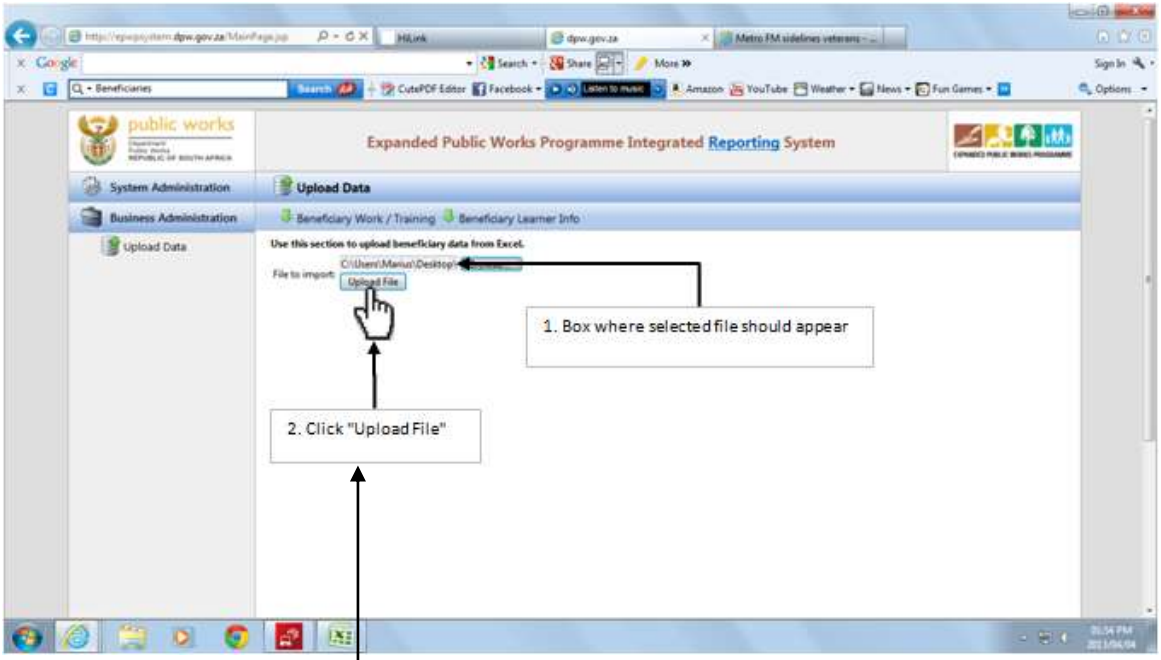
Once the 'Upload Data' section is open, click on browse and the system will open a window where you can choose the correct file to upload by searching where you saved it.

Figure 20-1: Bulk uploading – retrieving file to upload



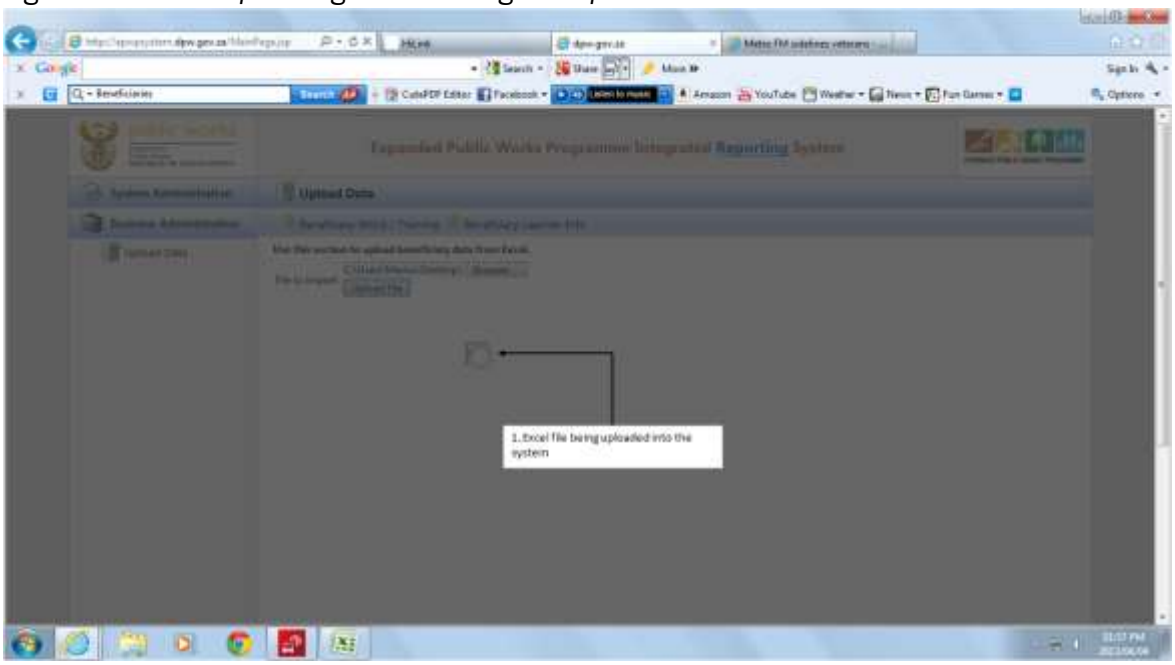
When you have found the correct file to upload, choose it (click on it) and click open. Thereafter, the directory of the chosen file will be attached for uploading onto the system.

Figure 20-2: Bulk uploading – Upload File



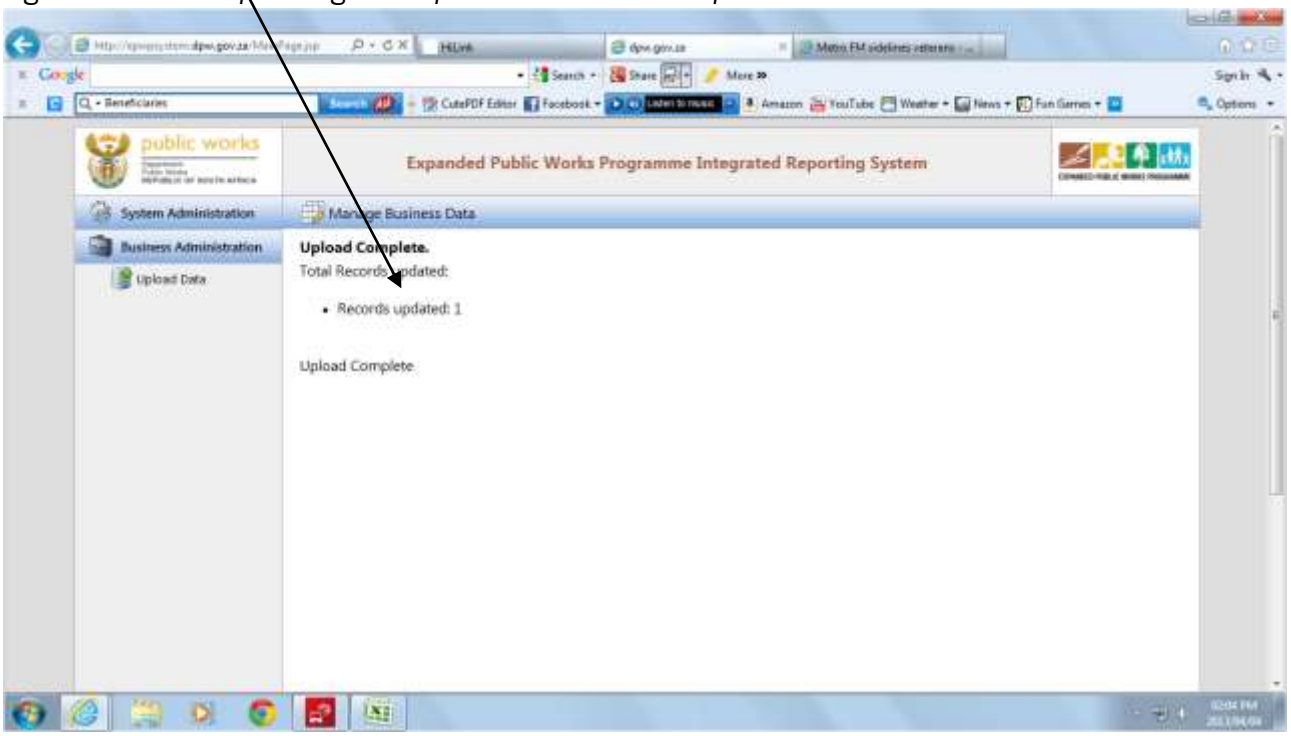
Thereafter, click on 'Upload File' to incorporate the beneficiary data into the system databases.

Figure 20-3: Bulk uploading – Processing File Upload



When the system has successfully uploaded employment beneficiary data, the system will show a message 'Upload Complete', accompanied by an indication of how many records have been updated. In this case, we only uploaded the employment data of one beneficiary, which is why the message is 'Records updated: 1'.

Figure 20-4: Bulk uploading – Complete and successful upload



If the upload process is complete but unsuccessful, the system will show a message that 'Upload Complete'. The user should check the name of the saved file if it does not consist of special characters such as apostrophes **('; ")** and bulk upload again.

Figure 20-5: Bulk uploading – Complete but unsuccessful upload

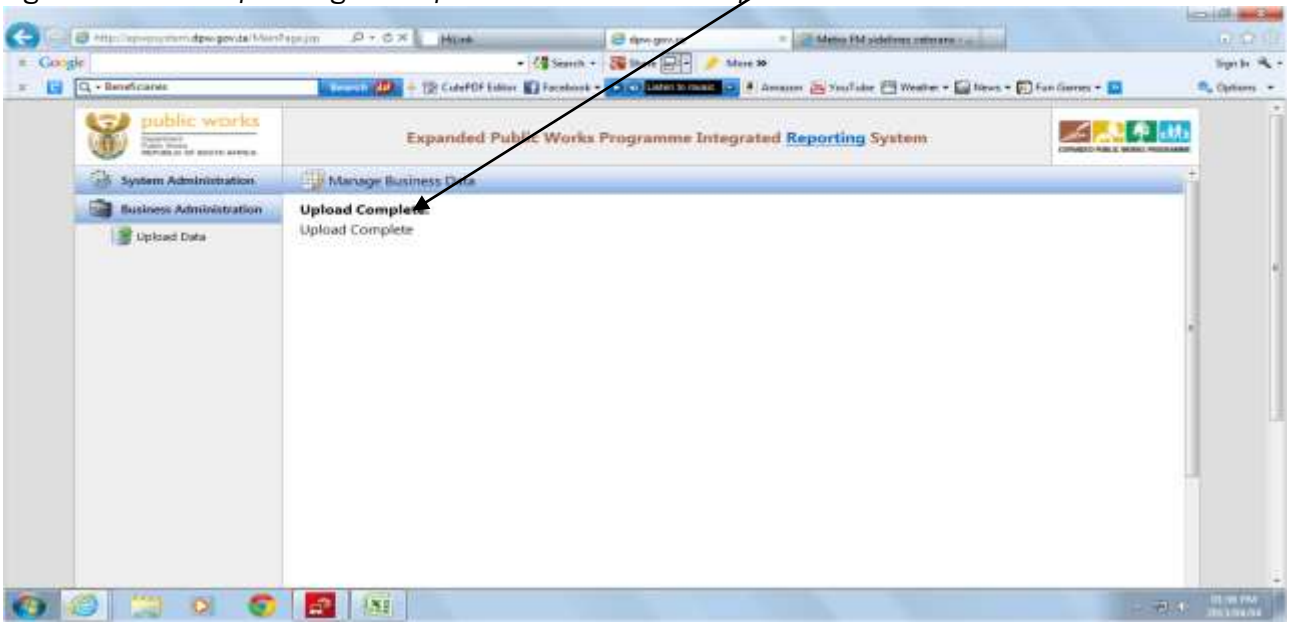
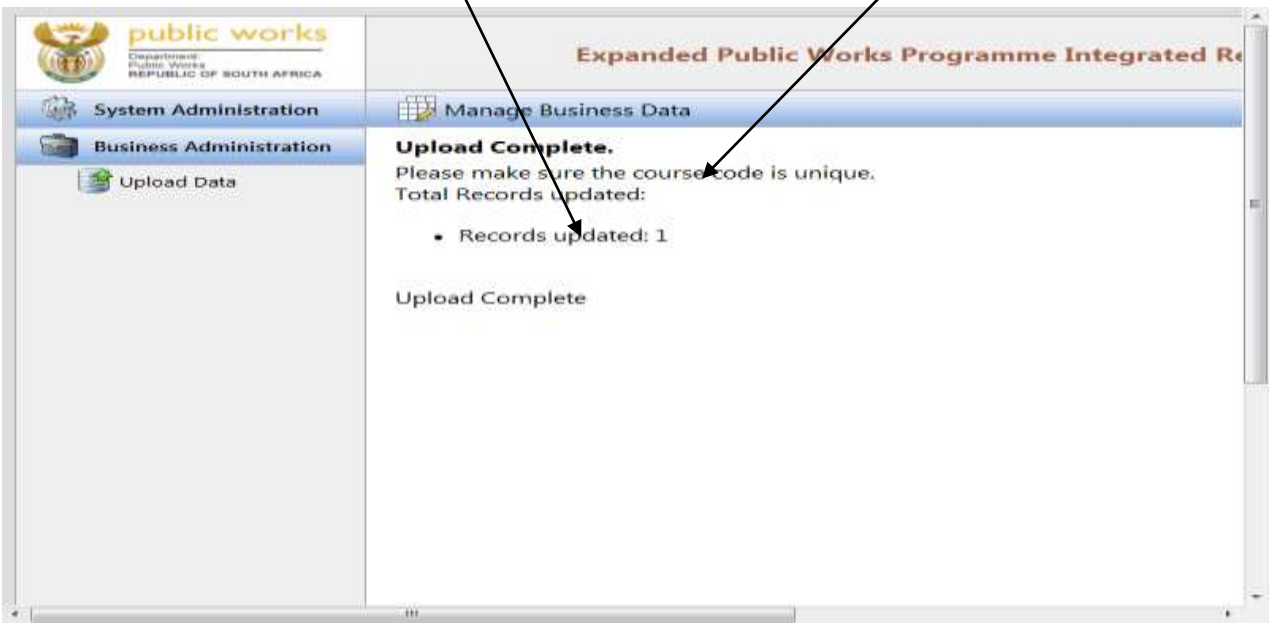


Figure 20-6: Bulk uploading – Complete but not all successfully uploaded

If the upload process is complete but not all employment or training data *successfully uploaded*, the system will show a message that 'Upload Complete'. It will further indicate the reasons for data not bulk uploaded and the number of records updated. The user should rectify mistakes identified and bulk uploads again. If rectified but still does not bulk upload, then print screen and send via email to the Help desk or System administrator.



Once employment and training data is successfully uploaded it must be verified at the *Employment* and *Training screens*. It should be noted that beneficiaries successfully uploaded,their personal data should be updated in the *Beneficiary database*.

SECTION 6: PROJECT ADMINISTRATION

PROJECT ADMINISTRATION

On completion of this step you will be able to:

- **Add** new projects, **Update** the existing projects or **Delete** incorrect project information

NB: For new projects Project Administration data precedes Business Administration

6.1 Overview

The system gives the Data Capturer, Viewer and Authoriser different access rights in the Project Administration area. For example, the system does not allow one Data Capturer to view another's projects or the right to sign off projects. Similarly, the system does not give a viewer the right to sign off and limits their participation rights to viewing projects that have been captured only.

Table 3: System User Access and Rights in Project Administration

Area	Capturer	Viewer	Authoriser
Projects	No Access	Access	Access
Rights	A ☐ E ☐ F ☐ D ☐	A ☐ E ☐ F ● D ☐	E ● F ● D ☐ S ●
My Projects	Access	Access	Access
Rights	A ● E ● F ● D ☐	A ☐ E ☐ F ● D ☐	E ● F ● D ☐ S ☐
Beneficiaries	Access	Access	No Access
Rights	A ● E ● F ● D ☐	A ☐ E ☐ F ● D ☐	E ☐ F ☐ D ☐ S ☐
Training Service Providers	Access	Access	Access
Rights	A ● E ● F ● D ☐	A ☐ E ☐ F ● D ☐	E ● F ● D ☐ S ☐
Project Service Providers	Access	Access	No Access
Rights	A ● E ● F ● D ☐	A ☐ E ☐ F ● D ☐	E ● F ● D ☐ S ☐
Sign Off Projects	No Access	No Access	Access
Rights	A ☐ E ☐ F ☐ D ☐	A ☐ E ☐ F ☐ D ☐	E ● F ● D ☐ S ●

Notes: A – Add Record; E – Edit Record; F – Filter Records; D – Delete Record; S – Sign-off

The Authoriser is the only user that is allowed by the system to sign-off on projects. The Authoriser can filter existing projects and can gain access into the restricted area regarding Project Information by means of the 'Edit Record' function.

6.1.1 DATA CAPTURER

For the Capturer, the Project Administration functional area consists of five (5) sub-headings:

- My Projects
- Beneficiaries
- Training Service Providers
- Project Service Providers
- Training

The system permits the user who is registered as a capturer the right to Add, Edit, Filter and/or Delete data, which means that the capturer has the right to:

Add new information – add a new project, budget, a beneficiary, training provided, etc
Edit existing information – make changes to already existing information such as expenditure
Filter – filter for specific information, e.g. when searching for beneficiaries with a valid status
Delete existing information – delete incorrect captured information during capturing (in particular areas)

6.1.2 VIEWER

For the Viewer, the Project Administration functional area consists of six (6) sub-headings:

- Projects
- My Projects
- Beneficiaries
- Training Service Providers
- Project Service Providers
- Training

The system permits the user who is registered as a viewer the right to mainly view, by Filtering Records of existing projects:

Filter – filter for specific information, e.g. when searching for beneficiaries with a valid status

6.1.3 AUTHORISER

For the Authoriser, the Project Administration functional area consists of six (5) sub-headings:

- Projects
- My Projects
- Sign Off Projects
- Project Service Providers
- Training

The system permits the user who is registered as an Authoriser/Sign Offer the right to Edit, Filter certain data and projects as well as Sign Off projects:

Edit existing information – make changes to already existing information
Filter – filter for specific information, e.g. when searching for beneficiaries with a valid status
Sign Off Projects – sign off projects that are valid for sign off

6.2 Projects

6.2.1 VIEWER'S PROFILE

The system allows the Viewer the right to view, by filtering through existing projects only. This enables the Viewer to check for correctness of the data and to give feedback to capturers. For access to details of a project the rights of a Viewer are restricted to viewing the summary list of projects – the viewer does not have the right to 'Edit Record', which would permit this.

6.2.2 AUTHORISER'S PROFILE

The system allows the Authoriser the right to edit, sign off and filter existing records of existing projects. The Authoriser has access to details of a project by virtue of the right to 'Edit Record', which would permit this.

The Authoriser can sign off projects that are valid and compliant for sign off on a quarterly basis prior closure of the system.

6.3 My Projects

6.3.1 VIEWER'S PROFILE

The system allows the Viewer the right to view, by filtering through existing projects only. This enables the Viewer to check for correctness of the data and to give feedback to capturers. For access to details of a project the rights of a Viewer are restricted viewing the summary list of projects – the viewer does not have the right to 'Edit Record', which would permit this.

The Viewer can filter existing project records by using Project Name, Project Code, Programme or Sub Programme.

6.3.2 AUTHORISER'S PROFILE

The system allows the Authoriser the right to edit and filter existing records of existing projects.

6.3.3 DATA CAPTURER'S PROFILE

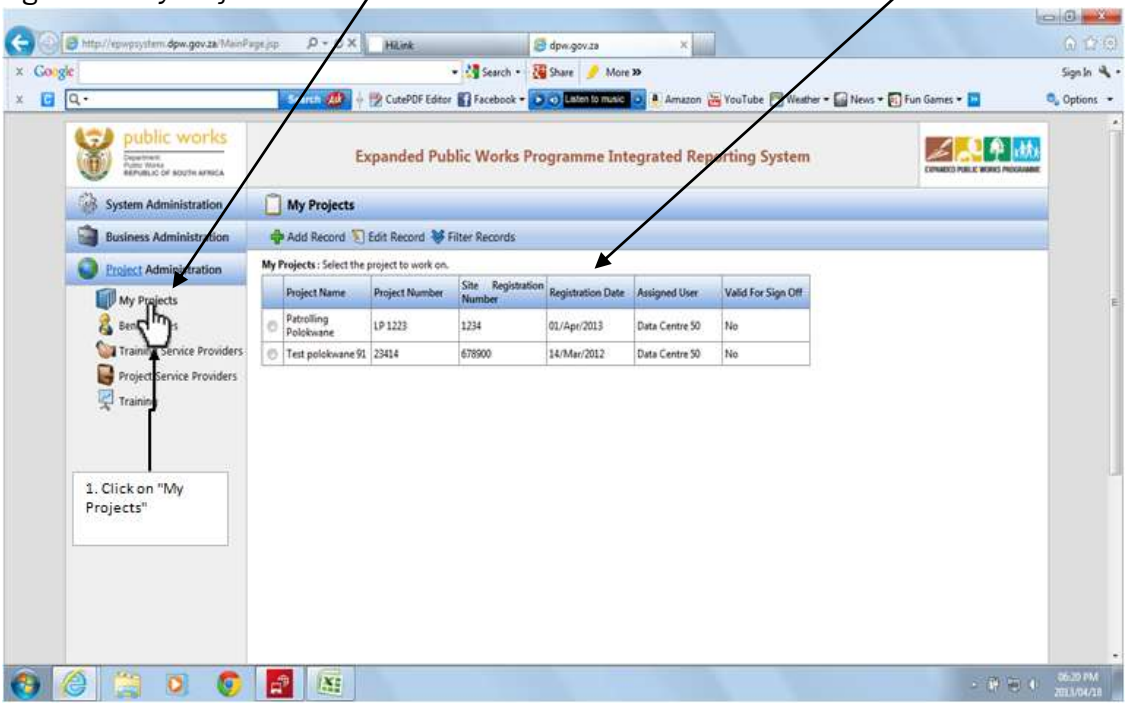
The system allows the Data capturer the right to add a new project, edit an existing one and view existing ones by filtering through.

Please see section 7.4 *(below)*, which outlines the process of capturing a project, in detail.

6.4 My Projects

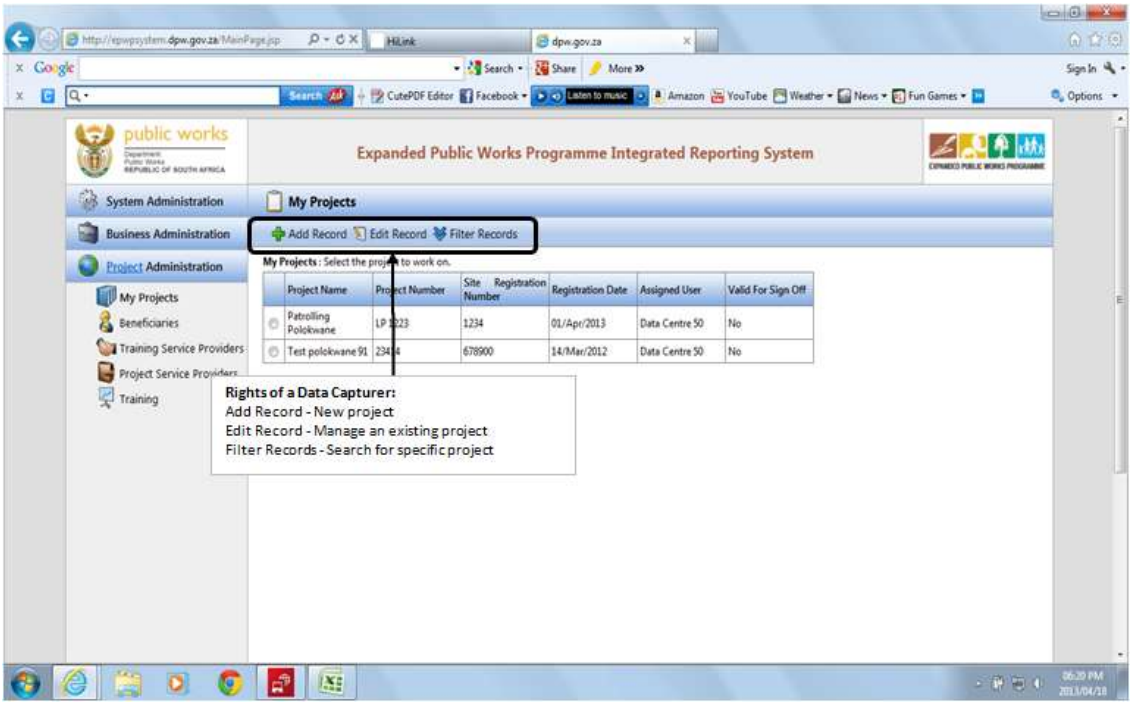
Click on "My Projects" under Project Administration and system will show a list of projects that have been captured by the logged-in Data capturer, if there are any.

Figure 21: My Projects



Under "My Projects", as a Data capturer, the system allows you to add record, edit record and filter records, as shown below. Please note that the system does not give a Data capturer the right to delete any projects that have been captured. It is only the System administrator permitted to delete projects when mistakenly captured prior the cut-off date. Once projects are included in a quarterly report they are not allowed to be deleted because M&E will have counted them in the cumulative report.

Figure 21-1: Data Capturer's rights in My Projects

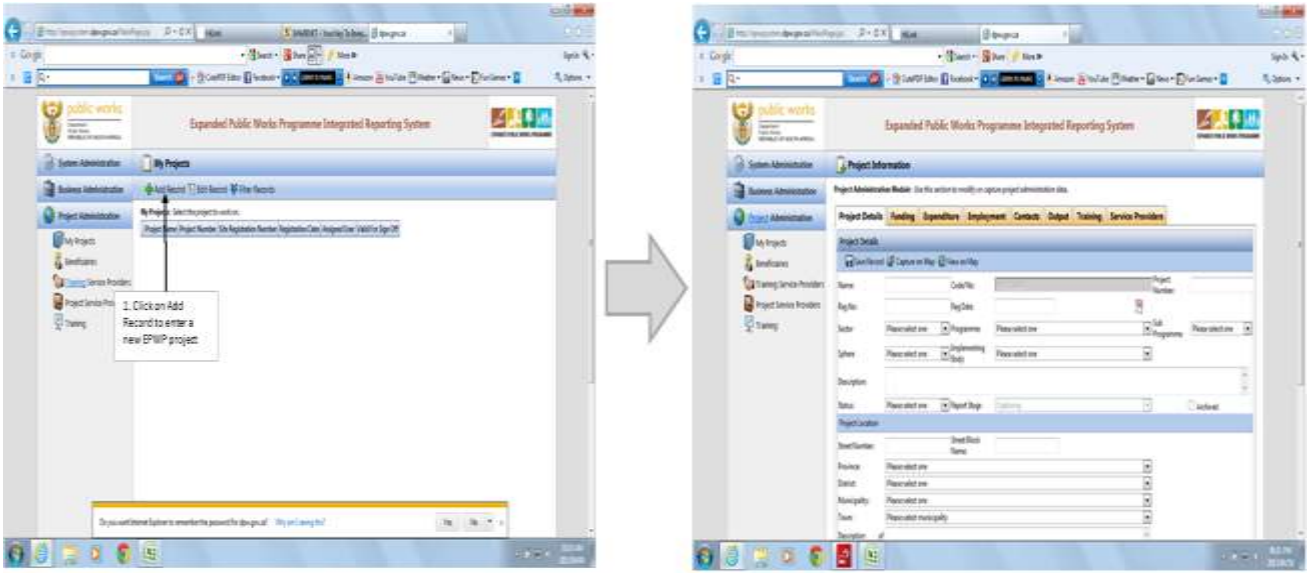


In other words, as a Data capturer you can Add, Edit or Filter Record only:

- To Add a new project click on Add Record
- To update an existing project click on Edit Record
- To look for specific projects, such as projects that are invalid, click on Filter Record

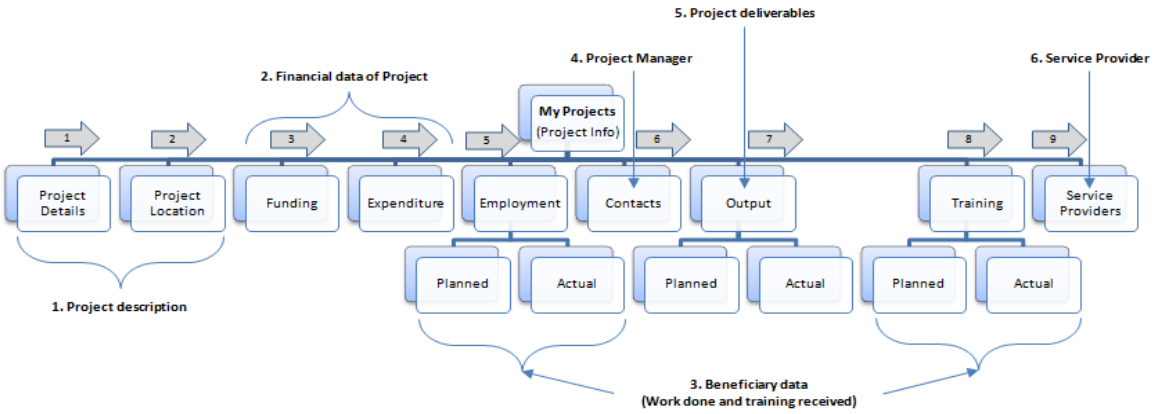
Click on Add Record and the system will take you to the restricted area of Project Information.

Figure 21-2: Adding a new EPWP Project into the system



In the Project Information area, each EPWP Project is structured into the nine (9) key segments – *figure 21-3*.

Figure 21-3: Components of an EPWP Project in the system



These nine segments can be group into six logical areas to answer the following questions:

1. Project description: What is the project about and where it is taking place?

2. Financial data: Who funded the project and how were the funds utilised? Wages and non-wages

3. Beneficiary data: Who benefited from the labour intensive work opportunities and training of the project?

4. Project Manager: Who knows what is happening in the implementation of this project? Only officials and not contractors/NGOs

5. Project deliverables: What are the outputs of the project? End product and not milestones

6. Service providers: Which service providers, if any, benefited in the implementation of the project?

6.4.1 Add Project

To guide a Data capturer in adding a new EPWP Project into the system, we provide context by means of an EPWP Project that took place in the Eastern Cape – this is a dummy project.

CONTEXT

Province: Eastern Cape

District: Alfred Nzo DM

Municipality: Umzimvubu LM

Alfred Nzo DM is the Water Service Authority that is responsible for the provision of water supply in the town of Mount Frere under the Umzimvubu LM. One of the surface water sources that supplies water to the town of Mount Frere is the Ntenetyana Dam.

In this EPWP project, the bulk water supply pipes that carry water over an 18km distance from the Ntenetyana Dam to the town of Mount Frere are being refurbished at a cost of R19 million. This bulk water supply infrastructure refurbishment project will be undertaken over a seven (7) month period from 1 January 2013 to 31 July 2013.

This project has 120 beneficiaries engaged in labour intensive work of the project.

Before we capture this information on the system, we first transfer the relevant aspects of this project onto an EPWP Project Data Form.

Table 4: Adding new EPWP Project data into a Data Collection Tool

IRS Data Collection Form		
Project Details		
Field requested	**Complete this section**	**Description**
Project Name	XN WS Water Supply	Should be unique
Code No (IRS Number)*		*Optional - IRS System Generated Value
Project Number	XG/SS/1000	Should be unique
Registration Number		Number allocated during project approval(NPO/MIG etc)
Registration Date	01 January 2013	Date prior project kick start. IRS Date Format 09/Jul/2012
Sector	Infrastructure sector	Will delete Sub-Program if updated
Program	Municipal Infrastructure	Completed when Sub-Program is selected
Sub-Program	Water and Sanitation	Determine program
Sphere	Municipality	Where the project is implemented
Implementing Body	Alfred Nzo	Name in full, abbreviations should be avoided
Description	Upgrade of 18km infrastructure water supply	Is advisable to be specific ***(upgrade of infrastructure water supply)*** and include unit of measure ***(km)*** with quantity ***(18)***.
Status	Implementation	
Report Stage		
Project Location		
Street number		Capture where applicable
Street Block name		Capture where applicable
Province	Eastern Cape	Capturing the Local Municipality name first will populate the District Municipality and Province automatically
District Municipality	Alfred Nzo	
Local Municipality	Umzimvubu	
Town	Mount Frere	If more than one, choose where majority is based
Description of Location	Between Ntenetyana dam and Mount Frere town	If in different wards or districts, capture the names of wards (ward 3, 9, 11 & 44) and or districts.
Longitude	Automatically completed by IRS	
Latitude	Automatically completed by IRS	

The Data Collection Tool contains almost all the fields that you will find on the system. The content of *Table 4* is the same project data that will be populated into the fields of the system.

This approach to capturing minimises the risk of transferring erroneous data since this part of project data cannot be rectified once saved.

Table 4-1: Relationship between a Data Collection Form and the system

Table 4 contains the same project data that will be populated into the system.

6.4.1 Capturing – project details and location

6.4.1.1 Project Details

ALWAYS REMEMBER

Work from left to right row by row, or press Tab to move from one field to another

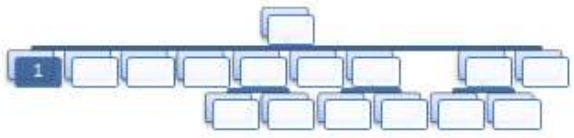
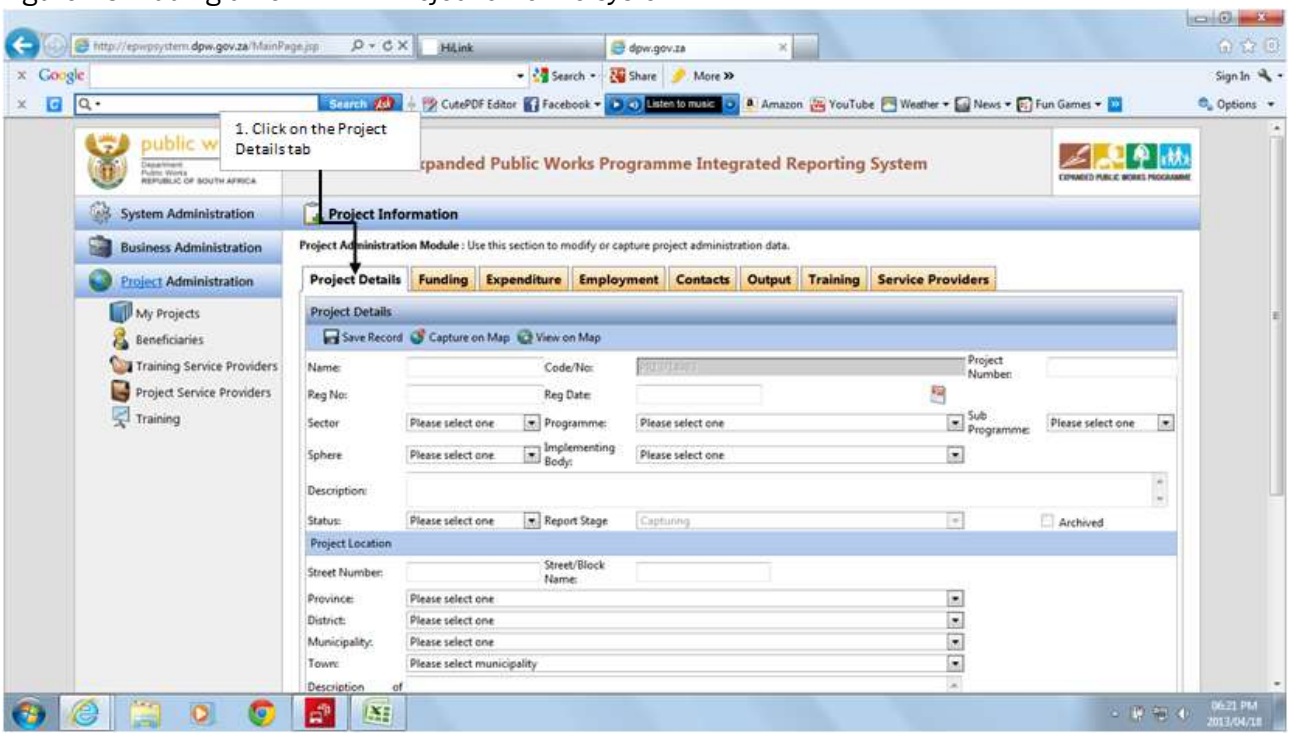


Figure 22: Components of Project Information

Figure 22 shows that we are on component 1 of the Project Information area – this is where project details are captured in the system.

Before basic project data of a new project can be captured make sure that Project Details screen is active by clicking on the Project Details tab *(figure 23)*. Then the capturer can enter basic information about a project.

Figure 23: Adding a new EPWP Project onto the system



The Project Details section provides fields for entering basic project data to describe the project and the location where it is taking place.

Basic Project data (Part 1: Name, Project number, Registration number and date)

Name: Enter the name of the project. This refers to the name as it appears on the tender documents and/or any other official documents. **In this example, we enter: XN WS Water Supply.**

NB: If the project is funded from the **incentive grant**, then the name of the project should be captured as follows**: IG/XN WS Water Supply**

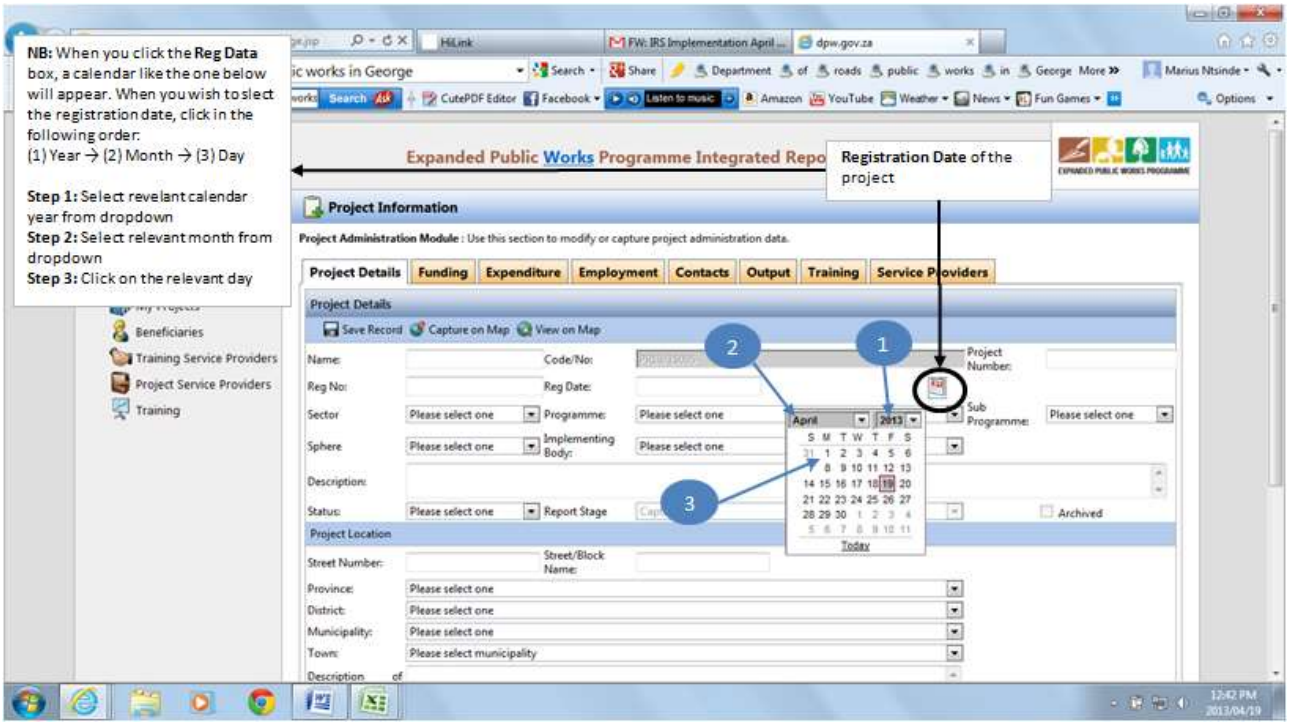
Code No: The system automatically generates the Project Code. **In other words, no entry is required in this field.**

Project Number: Enter the unique number as it appears on the tender documents and/or any other official documents. **In this example, we enter: XG/WS/1000.**

Registration Number: Enter the allocated number after the approval of the project such as an *NPO number for a Social Sector project, MIG number for an Infrastructure project and or Supply chain number for any Sector etc. It can be omitted if the project was not registered.*

Registration Date: Enter the registration date by clicking on calendar icon and following the step shown in *figure 23-1*, below. It is the date when the project was approved. This date should be prior the project start date. Please note that registration date in this example is taken as the day when the Municipal Council resolution about this project was taken and not the day the project was registered on the system.

Figure 23-1: Capturing registration date on calendar


NB: When you click the Reg Data box, a calendar like the one below will appear. When you wish to slect the registration date, click in the following order:
(1) Year → (2) Month → (3) Day
Step 1: Select revelant calendar year from dropdown
Step 2: Select relevant month from dropdown
Step 3: Click on the relevant day
Registration Date of the project
Project Information
Project Administration Module : Use this section to modify or capture project administration data.
Project Details
Funding
Expenditure
Employment
Contacts
Output
Training
Service Providers
Save Record
Capture on Map
View on Map
1
2
3
Beneficiaries
Training Service Providers
Project Service Providers
Training

The registration date is 1 January 2013 in this case. In case of social sector projects such as ECD, they should capture their date when the site was registered.

Procedure to capture date

Step 1: Select the relevant calendar year from dropdown list – 2013

Step 2: Select the relevant month from dropdown list – January

Step 3: Click on the relevant day – 1

Please note, when capturing date: First, select the relevant year from the dropdown list, followed by the month and then click on the relevant day, according to the steps shown in *figure 23-1*. After the relevant day *(step 3 in figure 23-1)* is clicked on the calendar, the date will be populated into the field.

Basic Project data (Part 2: Sector, Programme, Sphere and Implementing body, *among others*)

ALWAYS REMEMBER

Do not rush through from one dropdown box to another, this may cause the system to stall and you may be required to start all over again, as a result. Wait for it to give you an indication to proceed – which will be written as "Please select one", for example.

Sector: This is an Infrastructure Sector Project – choose sector from dropdown list. **In this example, we select Infrastructure**

Programme: This project falls under Municipal Infrastructure – choose relevant programme from dropdown list. **In this example, we select Municipal Infrastructure**

Sub-programme: Choose relevant sub-programme from dropdown list. **In this example, we select Water and Sanitation**

Sphere: This project falls under the jurisdiction of Alfred Nzo District Municipality – choose relevant sphere from dropdown list. **In this example, we select Municipality**

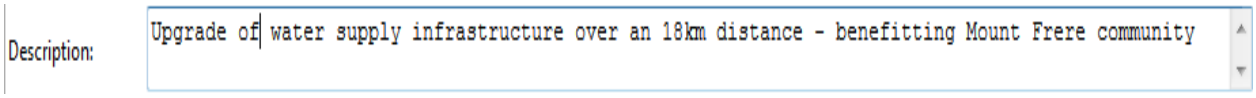
Implementing body: Choose relevant implementing body from dropdown list. **In this example, we select Alfred Nzo.**

NB: It should be noted that provincial departments should start by selecting a prefix such as EC: Department of Public Works and national departments should select the name of the department without a prefix e.g. Department of Public Works

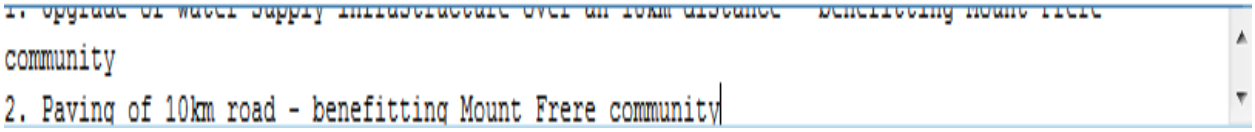
Description: Enter description of project in the field. Preferably should include exactly what is happening, unit of measure (km) and quantity (how many). In this example:

"Upgrade of water supply infrastructure over an 18km distance"

NB: Additional information for EPWP phase 3 includes community benefitting from the project and should be captured next to the project description, see reflected below:



NB: If the project have more than one project description such as upgrading of water supply infrastructure over an 18km distance and paving 10km. Therefore, it should be captured separately as follows including community benefitting:



Status: Choose status from dropdown list. The status is divided into five that is (i) Not initialised (The project has been approved BUT no expenditure yet); (ii) Initialised (There is expenditure BUT is for non-wages only such as material, engineering designs, protective clothing etc.); (iii) Implementation (Beneficiaries are involved including stipend); (iv) Terminated (Stop or put on hold) & (v) Completed (Can't be updated the following quarter). **In this example, we select Implementation**

Reporting Stage: The system will have defaulted capturing.

Archived: PLEASE SKIP THIS OPTION

6.4.1.2 Project Location

CONTEXT

This project is taking place between Ntenetyana Dam and the town of Mount Frere, so there is no specific address

Please enter **Street Number** and **Street/Block Name** if applicable, otherwise leave empty. These fields are not compulsory.

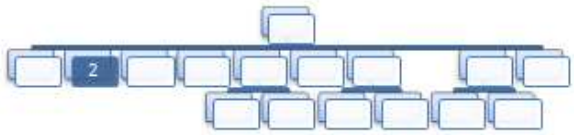


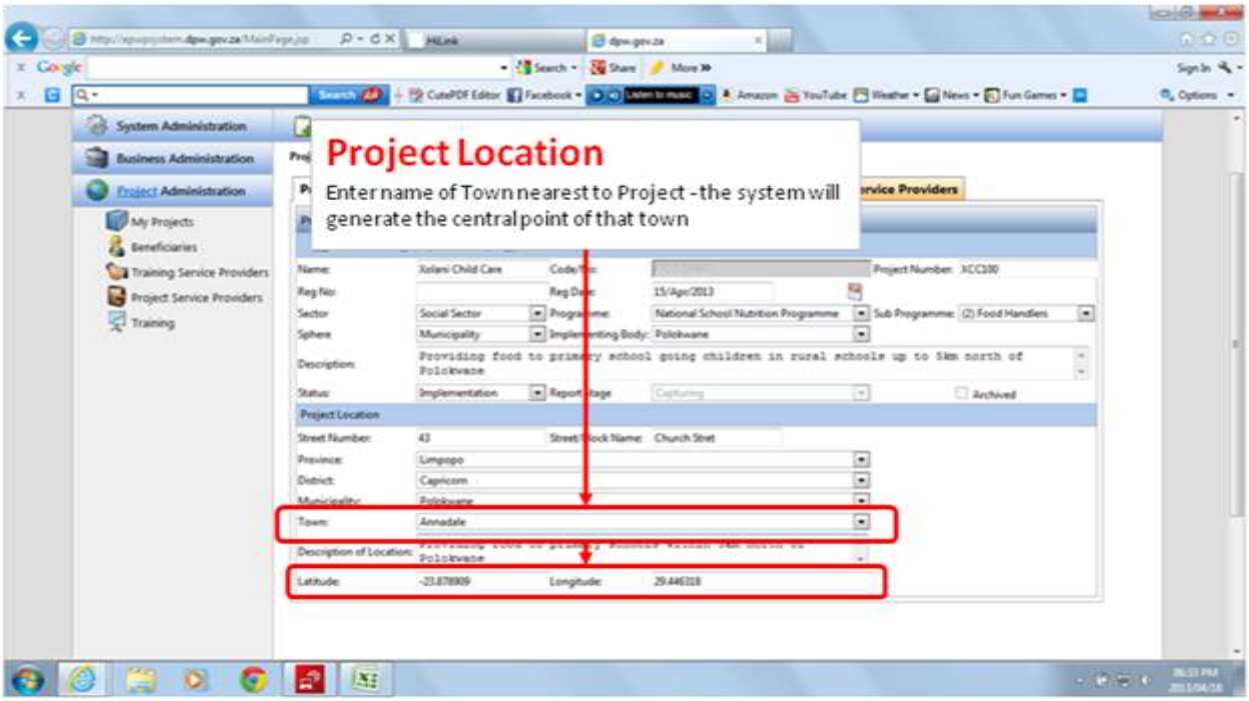
Figure 24: Components of EPWP IR System

Please note that the data for province, district and municipality may have been automatically populated by the system; otherwise, the data capturer will have to select from the dropdown boxes where the project is taking place, as follows:

Province (e.g. Eastern Cape) ⟶ District (e.g. Alfred Nzo) ⟶ Municipality (e.g. Umzimvubu) ⟶ Town (e.g. Mount Frere)

Once the name of the town has been entered, the system automatically determines the central coordinates (latitude and longitude) of that town. In this case, Mount Frere is the town that nearest to where the project is taking place and the coordinates are: Latitude (-30.740909) and Longitude (28.715012).

Figure 25: X and Y coordinates of town near the project area



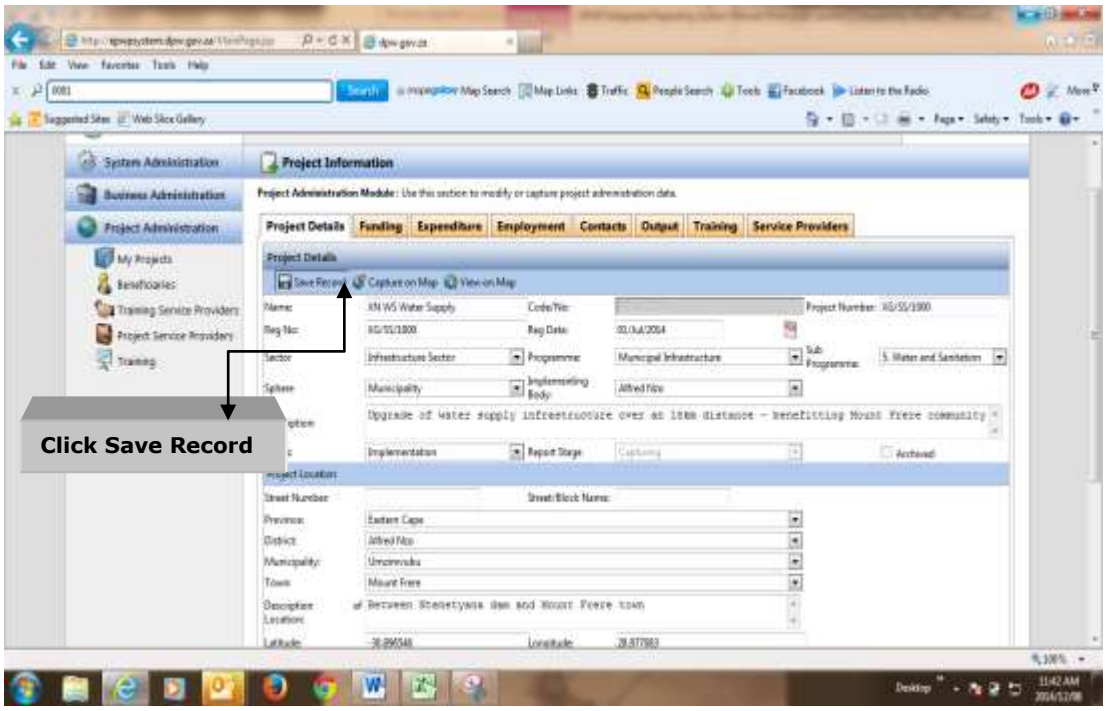
In other words, the central point of Mount Frere is located about 30.7 degrees south of the equator (y = -30.740909) and about 28.7 degrees east of the Greenwich Meridian (x = 28.715012).

Description of location: Provide a brief description of where the project is taking place, in this case:

"Between Ntenetyana Dam and Mount Frere town"

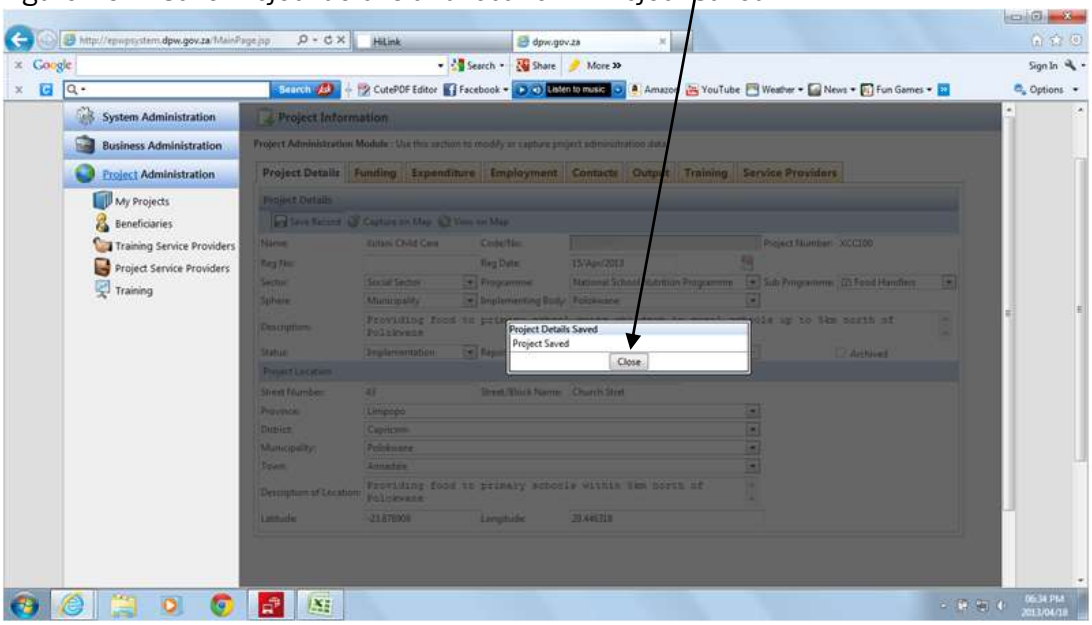
After the correct Project Details and location have been entered, then click Save Record.

Figure 26: Save Project details and location



The system will indicate if the Project Details have been saved and click Close.

Figure 26-1: Save Project details and location – Project Saved



POINTS TO REMEMBER:

1. This is the only stage in the capturing process that has to be completed in full, without interruption.

2. If the data capturer exits this stage before completion, the data will not be saved.

3. Once Project Details and Project Location have been successfully saved and closed, the data capturer can take a break and exit the screen by clicking *Logout.* To proceed after *Logout*, enter username & password and click *Login.* The capturer can also proceed updating the project data immediately after saving. When the data capturer returns to this project, the system does not allow for any changes to be made to the saved data. All the fields will appear in a grey font; this means that the system will not allow for any changes to be made.

4. This is the only screen after saving if mistakes are done such as Project name, number, description etc. cannot be changed or delete. A request should be sent to the System administrator to delete so enable the Capturer to recapture correctly.

5. The system, however, allows for the data capturer to make changes to the status of the project. By making changes to project status, the data capturer can indicate if the project has been completed, or terminated, etc.

6. From this part the system allows the data capturer to update the system as the project is being implemented until completion.

6.4.2 Updating a project

6.4.2.1 Introduction

EPWP REPORTING CYCLE

The reporting cycle of EPWP projects runs from the 1st of April each calendar year to the 31st of March of the following calendar year. In our example of the water supply upgrade in the Ntenetyana project, which commenced on the 1st of January 2013 to be completed on 31 July 2013, data has to be captured for two EPWP reporting periods – the 2012/13 reporting period and the 2013/14.

Data for the months of January to March 2013 falls under the 2012/13 EPWP reporting cycle, while data for the months of April 2013 to July 2013 falls under the 2013/14 EPWP reporting cycle. Each EPWP reporting cycle is divided into four (4) quarters, and it is as follows for the 2013/14 EPWP reporting cycle:

Quarter 1: 1 April 2013 to 30 June 2013

Quarter 2: 1 July 2013 to 30 September 2013

Quarter 3: 1 October 2013 to 31 December 2013

Quarter 4: 1 January 2014 to 31 March 2014

QUARTERLY END DATES ON THE SYSTEM

For data capturing the system closes 15 days after each quarter comes to an end; thereafter the system will not allow data of the previous quarter to be captured.

Quarter 1 closes on 15 July (midnight)

Quarter 2 closes on 15 October (midnight)

Quarter 3 closes on 15 January (midnight)

Quarter 4 closes on 15 April (midnight)

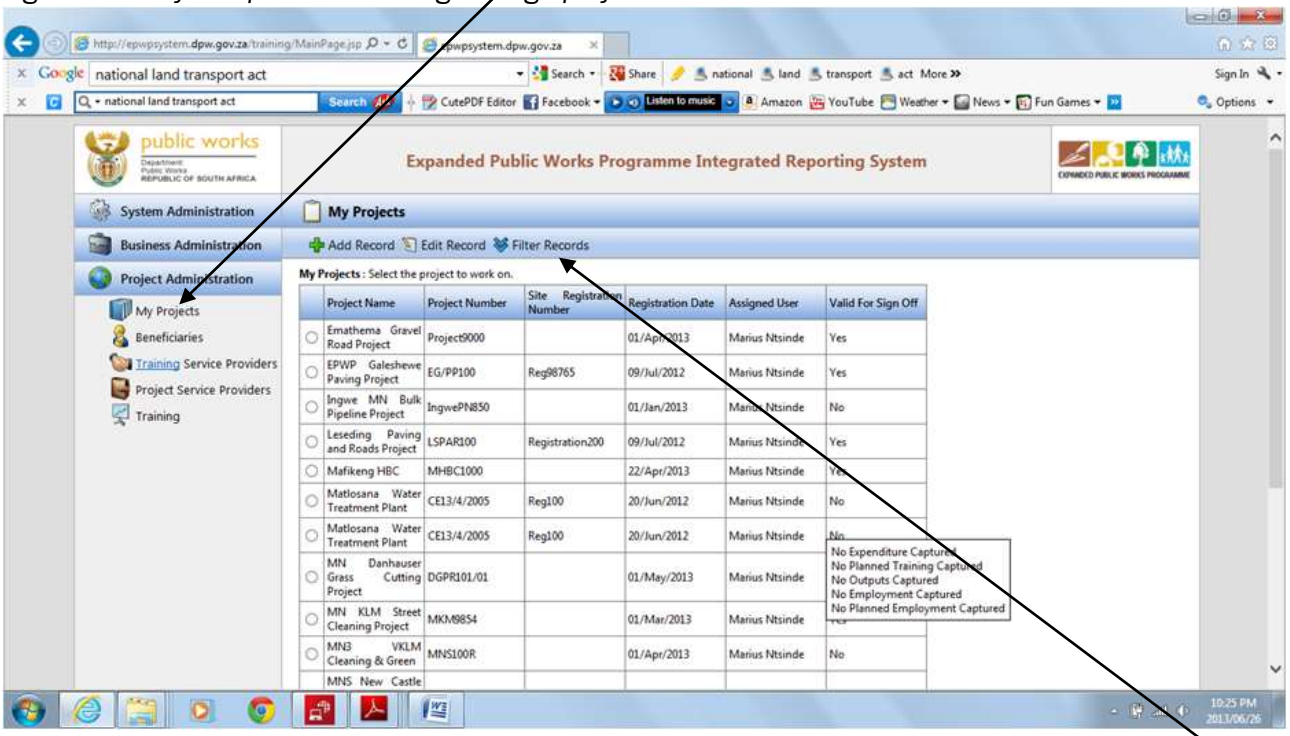
If a quarter closes and project data are not captured in the system, the Reporting body should apply for a special request and sent to the Director General (DG) of the National Department of Public Works including motivations. It is the DG on merit that will mandate the EPWP Monitoring and Evaluation and/or System Administration to have the previous quarter opened so that data can be captured.

6.4.2.2 PROJECT UPDATE

As the project progresses and implementation is taking place, project progress data has to be captured into the system during the reporting cycle. The section that follows outlines the procedure of updating an existing EPWP project – i.e. one that was saved on the system.

To open the 'Water Supply Upgrade in Mt Frere' project, make sure that you have logged-in and you are in the Project Administration functional area – **click on My Projects** and a list of EPWP projects that you have captured, if any, will be shown on the screen.

Figure 27: Project Update – Filtering through projects

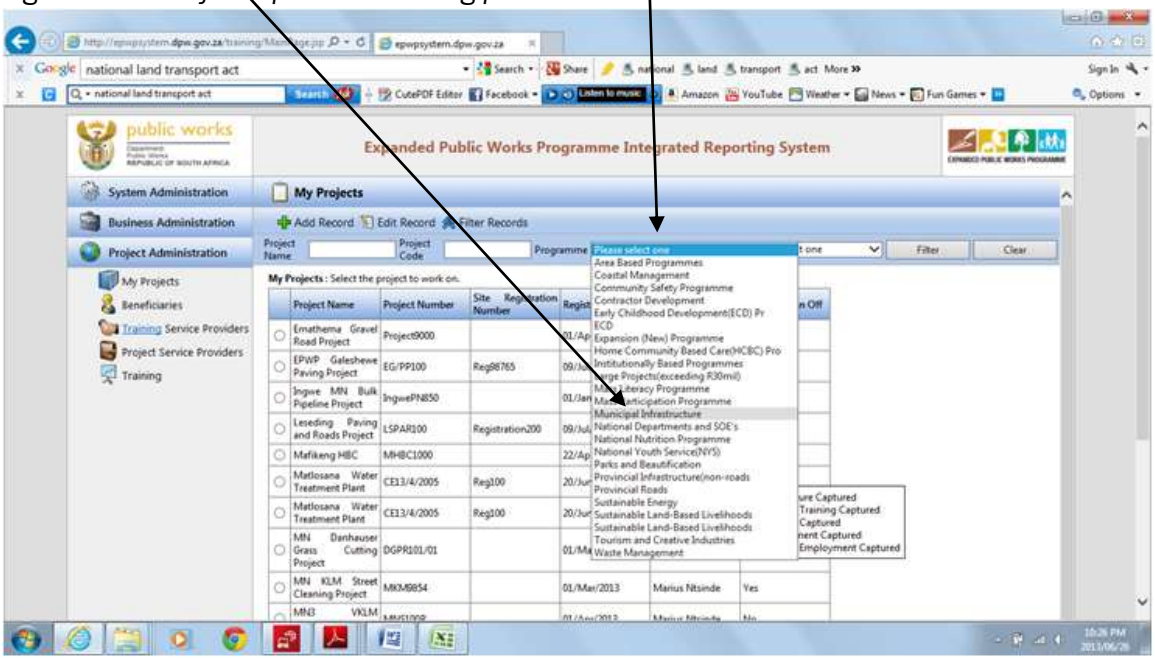


If you have numerous projects listed on the screen and struggle to find the relevant EPWP project **click on Filter Records**.

This allows you to find the specific project you want to work on.

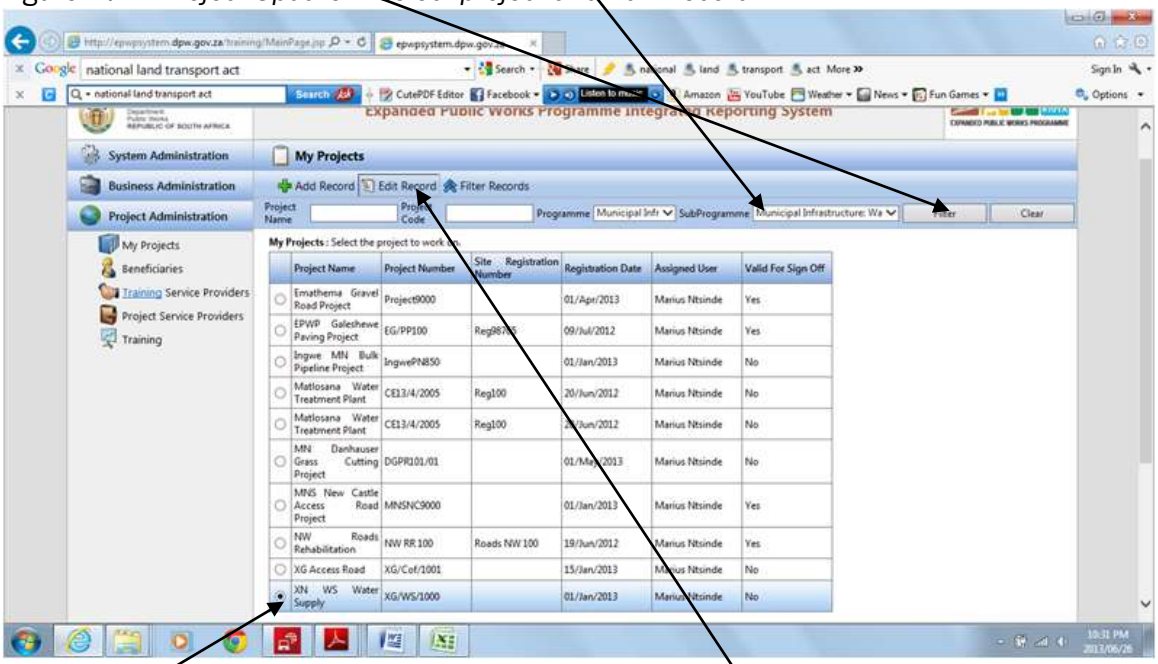
The 'Water Supply Upgrade in Mt Frere' project that we want to update falls under the Infrastructure Sector; it is a Municipal Infrastructure Programme under the Water and Sanitation Sub-Programme. If you have forgotten the name of the project **click on Programme** and a list of programmes will appear; **select Municipal Infrastructure** from the dropdown list.

Figure 27-1: Project Update – Filtering process



If you wish, also **select Municipal Infrastructure: Water and Sanitation** under sub-programmes and then **click Filter**.

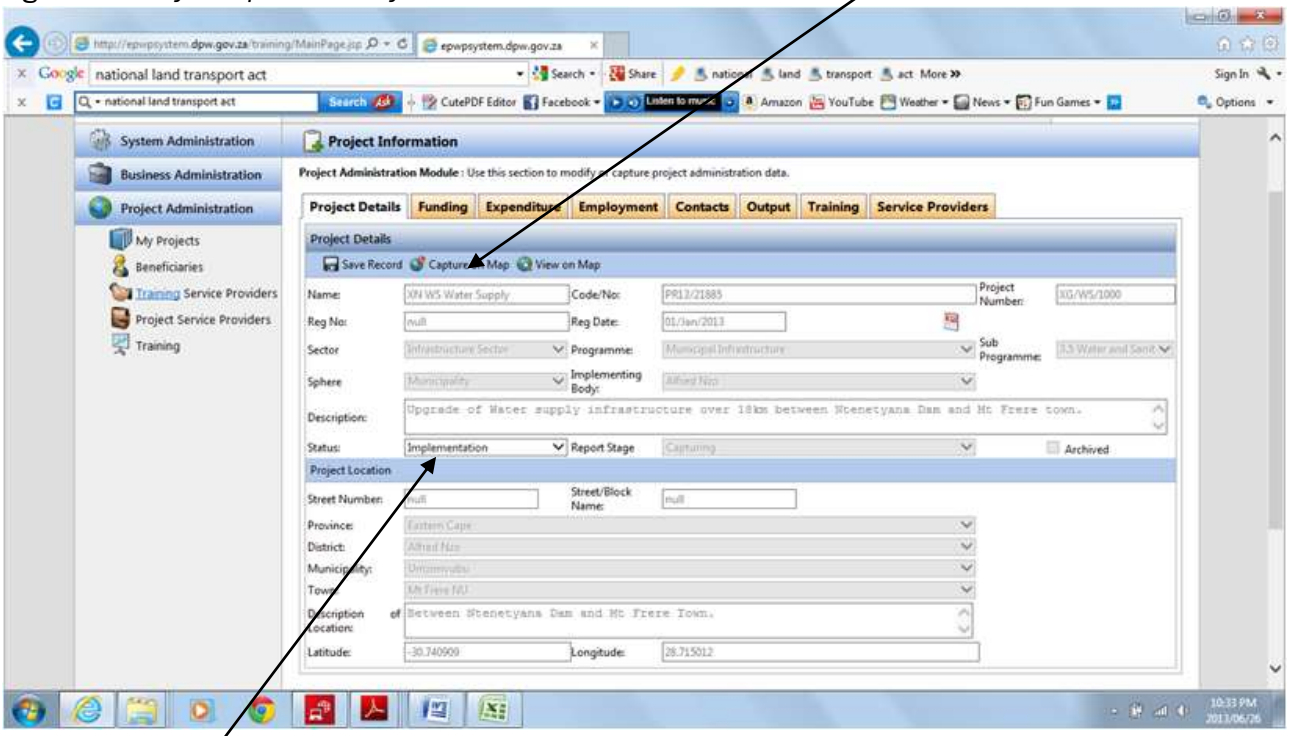
Figure 27-2: Project Update – Select project and Edit Record



Once you see the relevant project name, which is XN WS Water Supply in this case, **click on the radio button** next to it and when the project is highlighted **click on Edit Record**.

Thereafter, the system should open the project information area of this project – **XN WS Water Supply**, in this case.

Figure 28: Project Update – Project details



Please note that all the fields under Project Details are in a grey font. This means that the system will not allow for Project Details and Project Location to be edited.

The only field that can be edited, depending on the stage of the EPWP project as it progresses, is the **Status field**. At present, the XN WS Water Supply project is still being implemented. When it is completed you can select 'Completed' from this field's dropdown list – to indicate its completion.

From this point you can continue to capture data regarding the exact location of the project on the map, the Funding details, Expenditure, Employment, Contacts, Output, Training as well as Service Providers of the project.

Please see the procedure of capturing data in these areas in the sections that follow.

6.4.2.3 PROJECT LOCATION - GIS

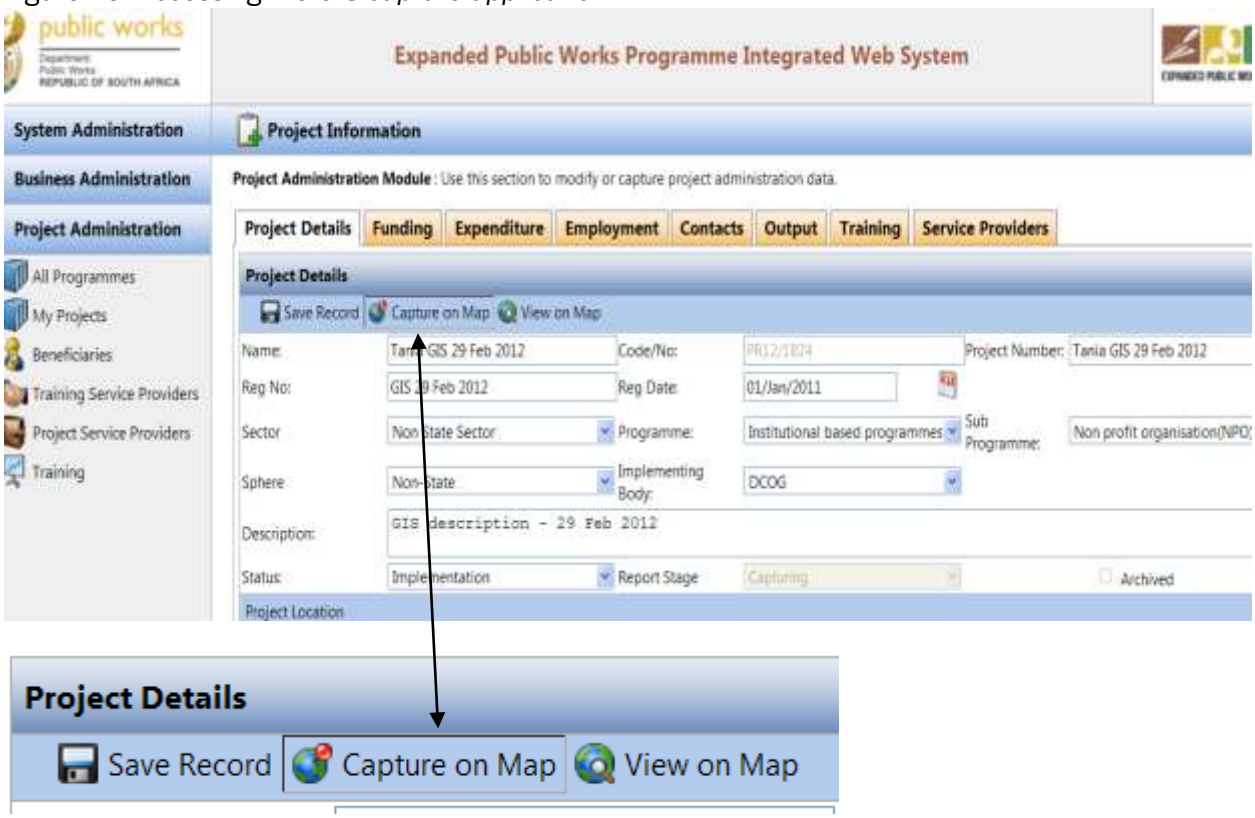
What is GIS?

In its simplest form, a Geographical Information System (GIS) can be seen as an electronic map. This view is supported by the following definition: "GIS is computer software that links geographic information (where things are) with descriptive information (what things are)" (ESRI, 2002).

Accessing the EPWP GIS capture application

The GIS application can be accessed from the Project Details section by clicking Capture on Map, as shown in *figure 29*.

Figure 29: Accessing the GIS capture application



The system will take you to the map page shown in *figure 29-1* and the map is always centred to nearest town selection in Basic Project screen.

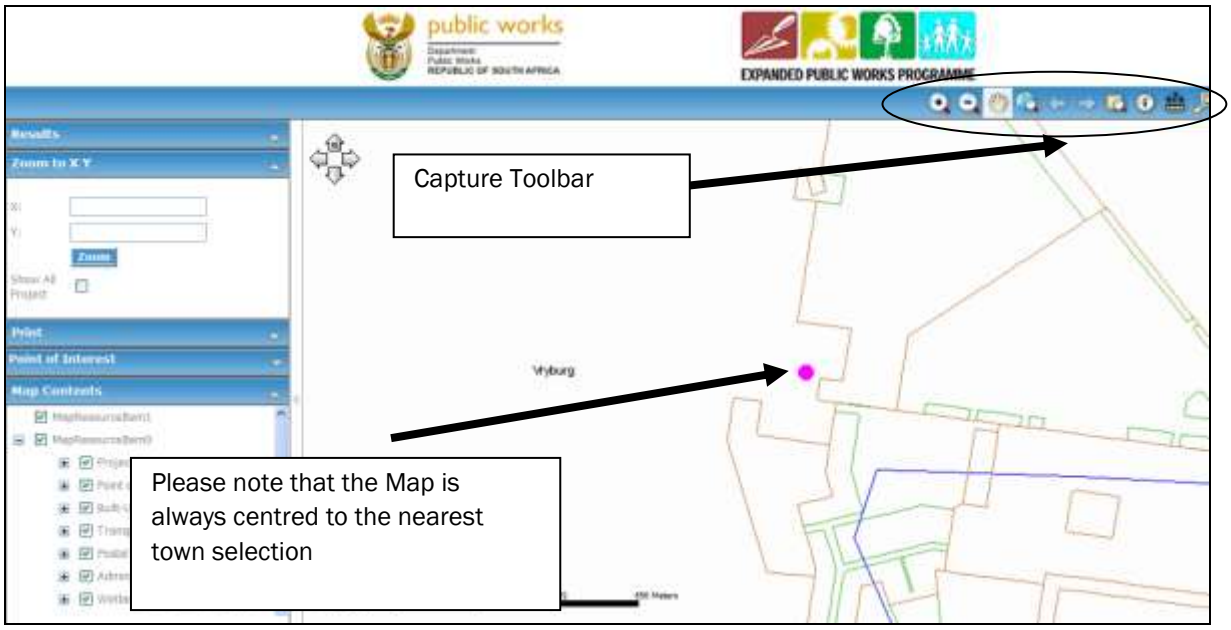
The centre of the nearest town, to the EPWP project, is depicted by the pink dot, which is derived from the latitude and longitude coordinates when the name of the town is selected from project location, when registering project details.

PLEASE NOTE:

The centre of the nearest town depicted by the pink dot is not necessarily the actual project location. Project implementers are encouraged during Inloco inspections to read and record the latitude and longitude coordinates.

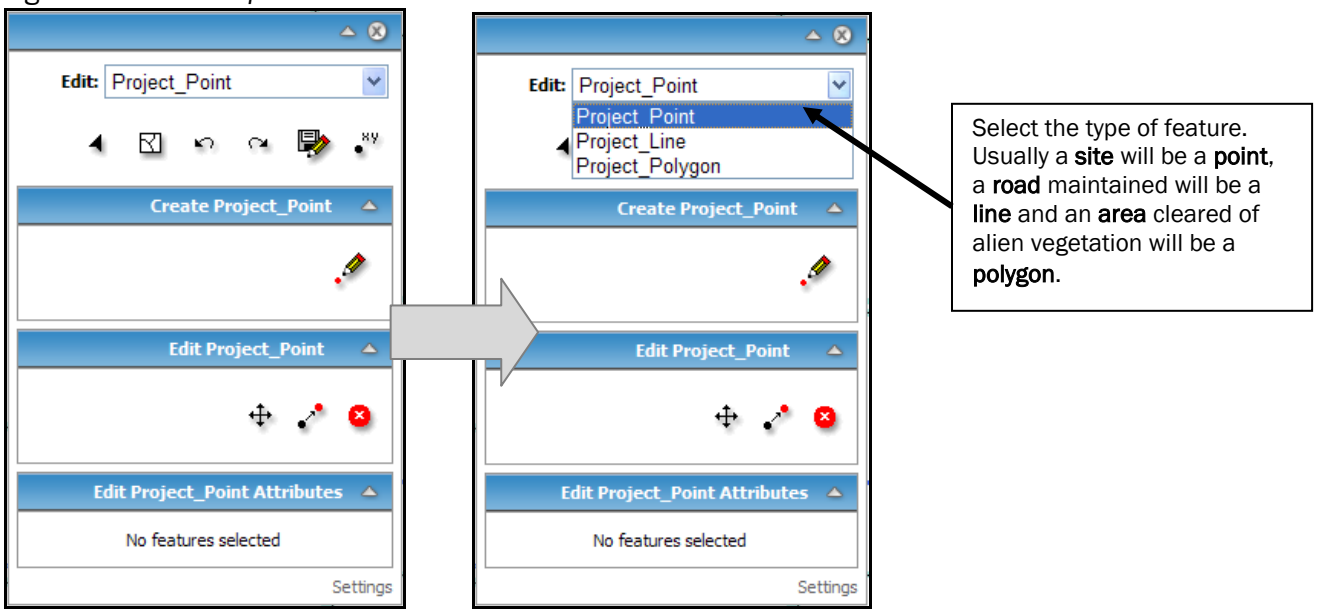
In this case, *figure 29-1* shows the centre of Vryburg and the actual location still has to be identified and captured.

Figure 29-1: The Capture Tool



Click the ***Capture Tool***, from the tool bar, and the capture window will open.

Figure 29-2: The Capture window


Edit: Project_Point
Create Project_Point
Edit Project_Point
Edit Project_Point Attributes
No features selected
Settings
Project_Point
Project_Line
Project_Polygon
Select the type of feature. Usually a site will be a point, a road maintained will be a line and an area cleared of alien vegetation will be a polygon.

Within the capture pop-up window, select the ***pen*** and capture the location of the project by clicking on the correct location in the map area. The new point will be visible on the map. You may add more than one point for a project by clicking multiple points on the map. If you are adding a line or polygon, double click when on the last point when you are done.

1. You may add ***"Comments"*** for the project.

2. The system will process the drawing (as shown by the green progress bar in the center of the map) and it will show the drawing on the map.

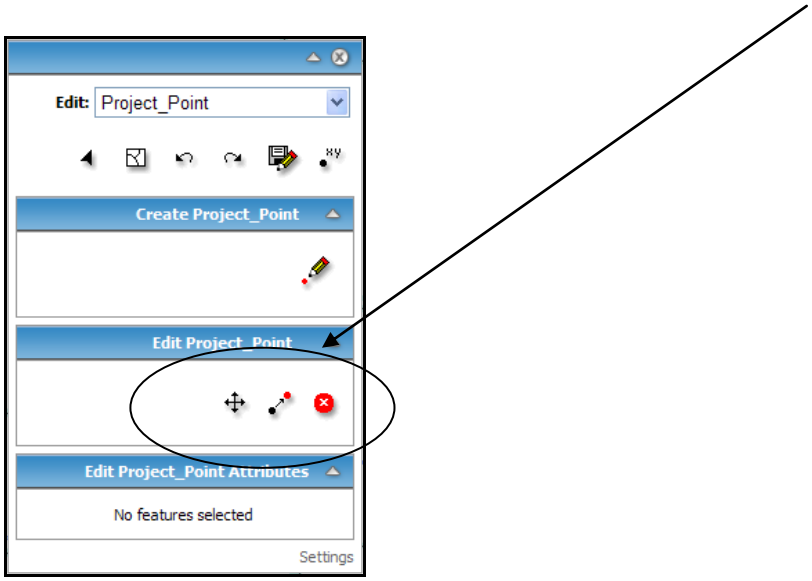
3. ***Save*** your drawing.

4. Close the capture pop-up window by clicking the ***X*** at the corner.

If you did not save, the following message will appear to indicate that you have not saved the project location, click ***cancel***, then go back and ***save***.

How to delete or move a point if captured incorrectly

If you captured the location incorrectly and would like to amend this, you can either delete the point or move the point. The following indicated the tools available to accomplish this.



1. To move a point that has been captured, make sure the point is selected by first selecting the select button and clicking on the feature you want to move. Then click on the ***move feature(s)*** icon from the capture tool pop-up window. Click and drag the point, while keeping the mouse button down, to the correct location.

2. To delete a point that has been captured, make sure the point is selected by first selecting the select button and clicking on the feature you want to delete. Then click on the ***delete feature(s)*** icon from the capture tool pop-up window and the captured project will be deleted once you click on the button . .

3. If you know the X, Y coordinates of a project point, you can add them by selecting and click the tool, then enter the X, Y coordinates. After adding the points, choose between Continue Adding if you still have more point(s) or select Add Final points if you want to finish adding points.

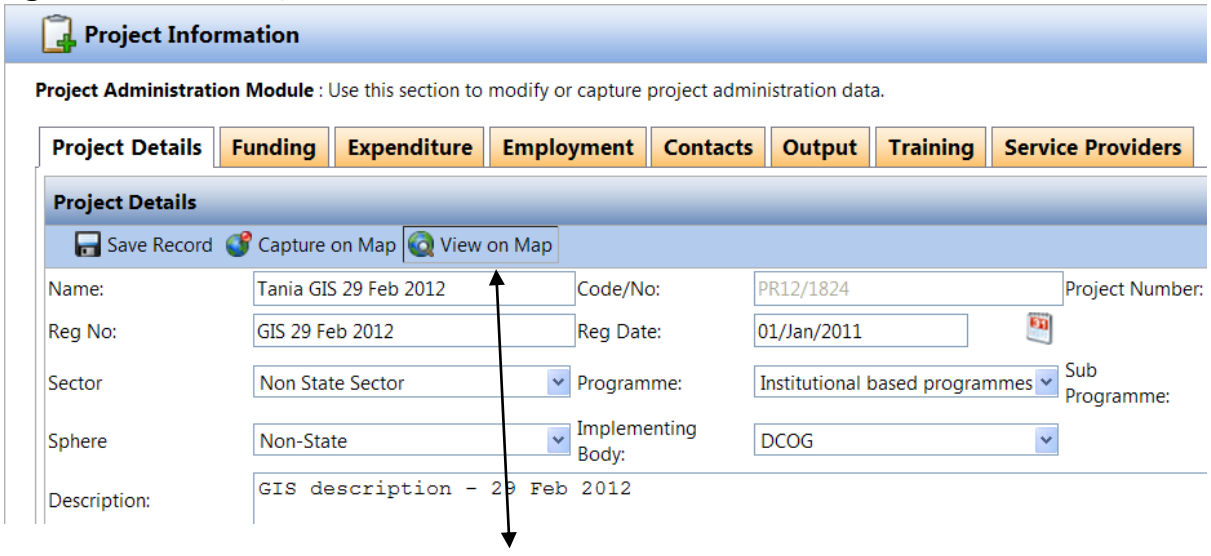
4. If you want to clear features on the map, select and click tool.

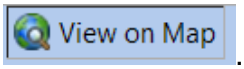
5. If you want to select a feature(s), please click tool.

How to view the location of a previously captured project

Start by going to the project in the project list of the EPWP Web-based System and open the project's basic information.

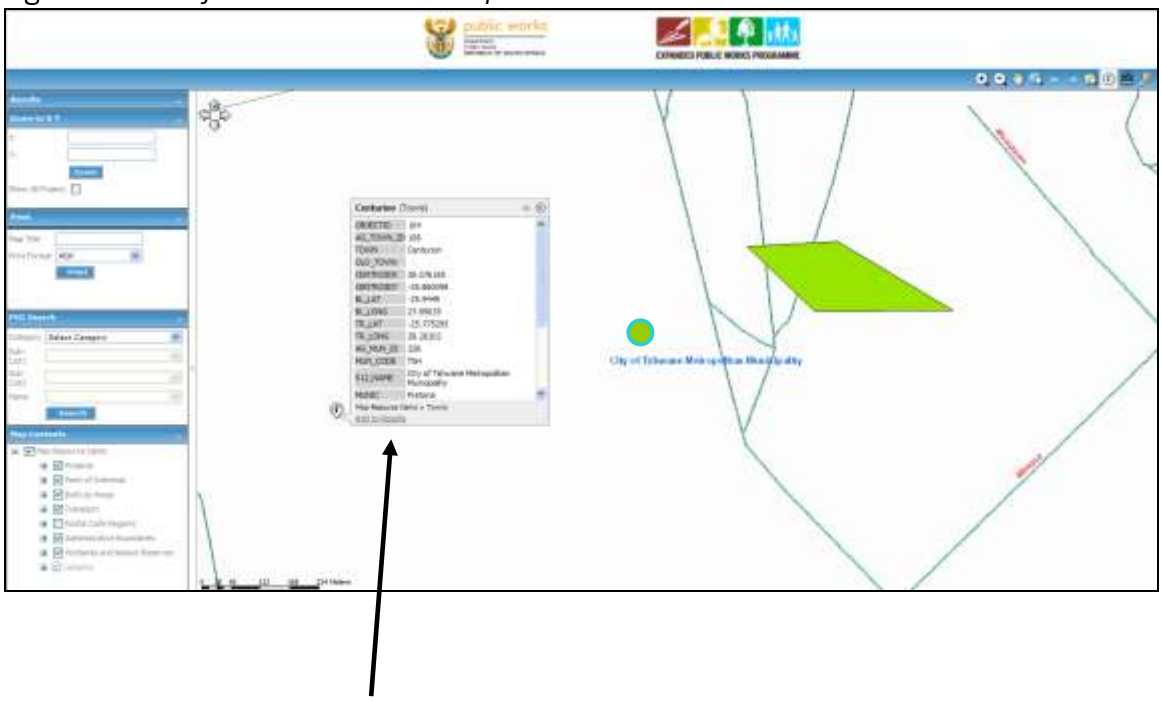
Figure 30: View on map



Then select the View Map icon - 

. The web-based GIS application will open and zoom to the location of the selected project.

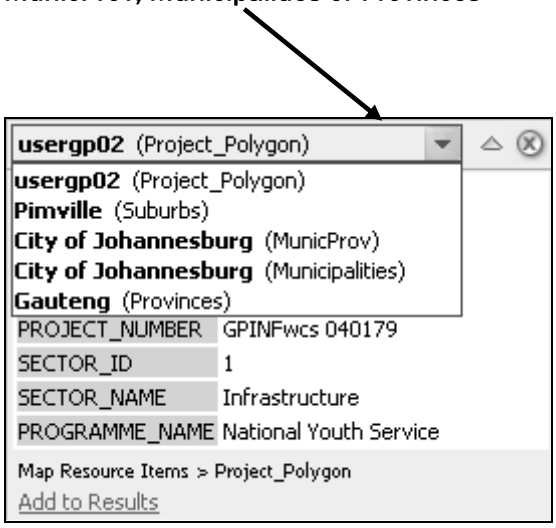
Figure 30-1: Project information on map



You can check the ***Project Information*** to confirm whether it is your project with the Map Identity button. First select the Map Identify button, and then click on the project in the map area.

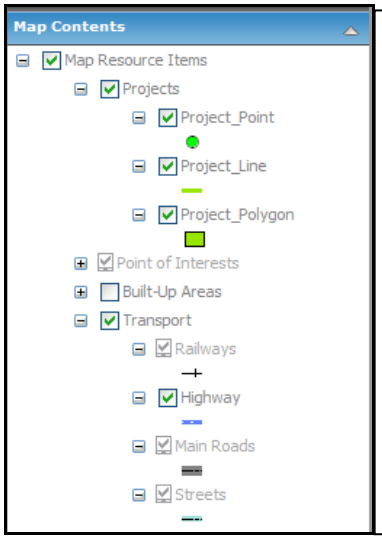
You will be able to confirm that it is your project by investigating the ***Username*** and the ***Comments*** information.

The map identity button enables the user to identify different features on the map by selecting this tool and then clicking on the feature. To change the layer for which information is supplied click on the upside down triangle next to the layer name in the pop-up box as seen from the screen shot below. The example below gives the user the choice to select between the following layers: **Suburbs, MunicProv, Municipalities or Provinces**



Map Legend

The web-based GIS system has a map legend on the left panel of the webpage.



The map legend displays the available layers or features visible in the map

Each layer can be made visible or invisible by turning it on or off with the check box .

Example 1: The Points of Interest layer is invisible on the current map because it is not zoomed in enough. (It is ticked but grayed out)

Example 2: The Built-Up Areas layer is turned off on the figure 7.

Layers can be expanded to see the map symbol

Example 3: The railway layer under transport category has been expanded it shows that it is represented by the following symbol .

Layers are grouped into categories i.e. *Projects, Point of Interests, Transport, etc*

Map Tool bar

Zoom in tool

Select this tool and then click on the map to zoom in. The map will zoom in centred on the clicked location. Click and while holding in the mouse button drag a rectangle to zoom to a specific area on the map. The map will zoom into this area and display more detailed information. Keep zooming in till you can identify the area you are interested in.

Zoom out tool

Select this tool and click on the area of interest. The map will zoom out, centred to the clicked location. Click and while holding in the mouse button drag a rectangle to zoom out from a specific area on the map. The map will zoom out and show less detail but a larger area. The smaller the rectangle you draw, the farther out the map view will zoom.

Pan Tool

Select this tool and click (while holding the mouse button down) and drag the map to view a different area of the map. Release the mouse button to view the new area.

Full Extent

The button will allow you to zoom out to the full geographic extent of South Africa (or the Province).

Back Extent

This button will take you back to your previous view.

Forward Extent

Go forward a view when the Back Extent has been used.

Magnifier:

This will open a small window that maginfies that part of the map it is moved over.

Map feature identity

Select this tool and click any feature on the map. Information about the feature will display. For a description of the usage of this tool, refer to Page 22 of this user manual.

Measuring tool

This tool is used to measure a distance on the map. Select the tool then click on two points to measure the straight line distance between then. You can change the units of measure if you desire.

Overview map

Select this tool to show the current location of the zoomed in map on the entire South African map.

Clear Graphics

Clear any selected features on the map.

Capture tool

Select this tool if you want to capture the location of a project on the map. A pop-up window with more icons will open. Refer to page 17 for more information on how to capture a project.

Close tool: Click this tool to exit the web-based GIS application.

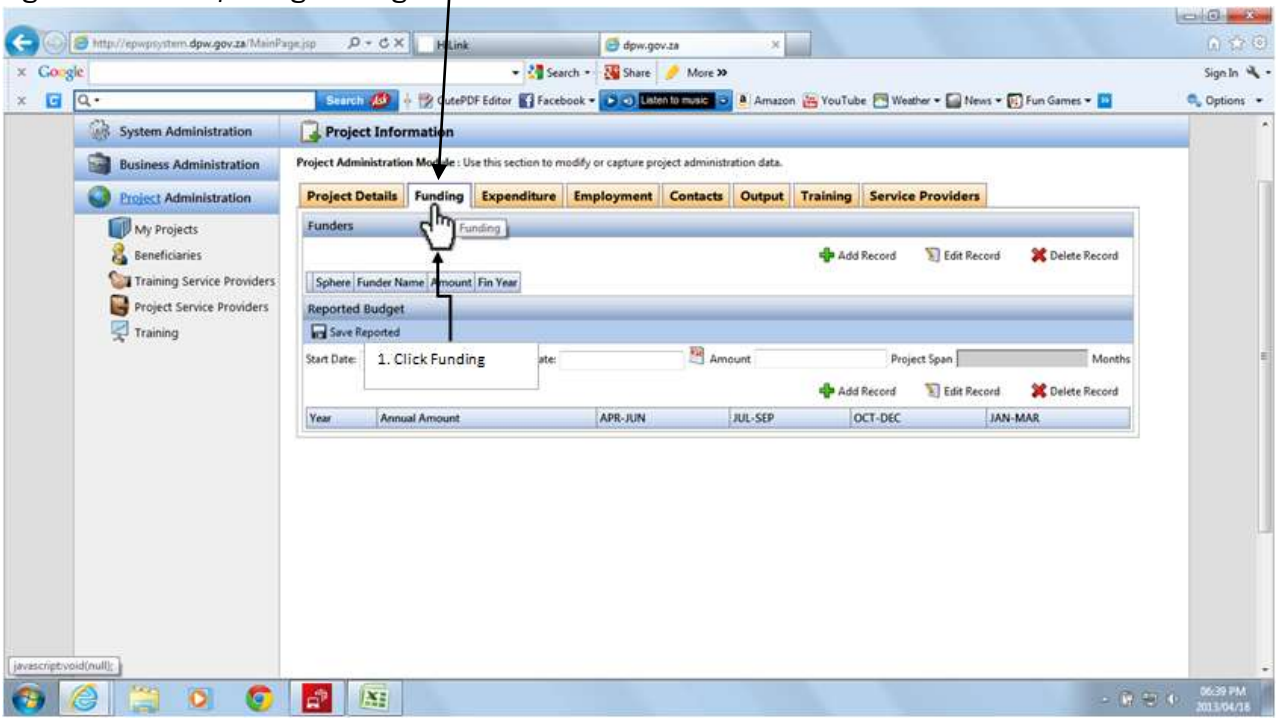
6.4.3 FUNDING

6.4.3.1 Introduction

To add funding data of a project **click on the funding** tab after project details have been saved.

Make sure that the Funding tab is active before entering funding data, as shown in *figure 31*.

Figure 31: The capturing funding details



Please note that this section is divided into **Funders** and **Budget** – **Funders** is about who funded the project and for how much, while **Budget** is about the amount of funds that have been allocated for the project.

Technically, the system provides for a **Planned Budget** and a **Reported Budget**. The **Planned Budget** relates to projects that have a multi-year budget, which goes beyond the current EPWP reporting period. If the project is for 1 financial year therefore the Planned and Reported Budget data will be the same. The **Reported Budget** (Annual) is for the current reporting period only. The Planned Budget section is only applicable to the Infrastructure Sector:

1. There are three (3) sections for the Infrastructure Sector: (i) Funder, (ii) Planned Budget and (iii) Reported Budget *(see figure 31-1)*.

2. There are two (2) sections for the Environment and Culture, Social and Non-State Sectors: (i) Funder and (ii) Reported Budget *(see figure 31-2)*.

Figure 31-1: Funding Screen for Infrastructure Sector

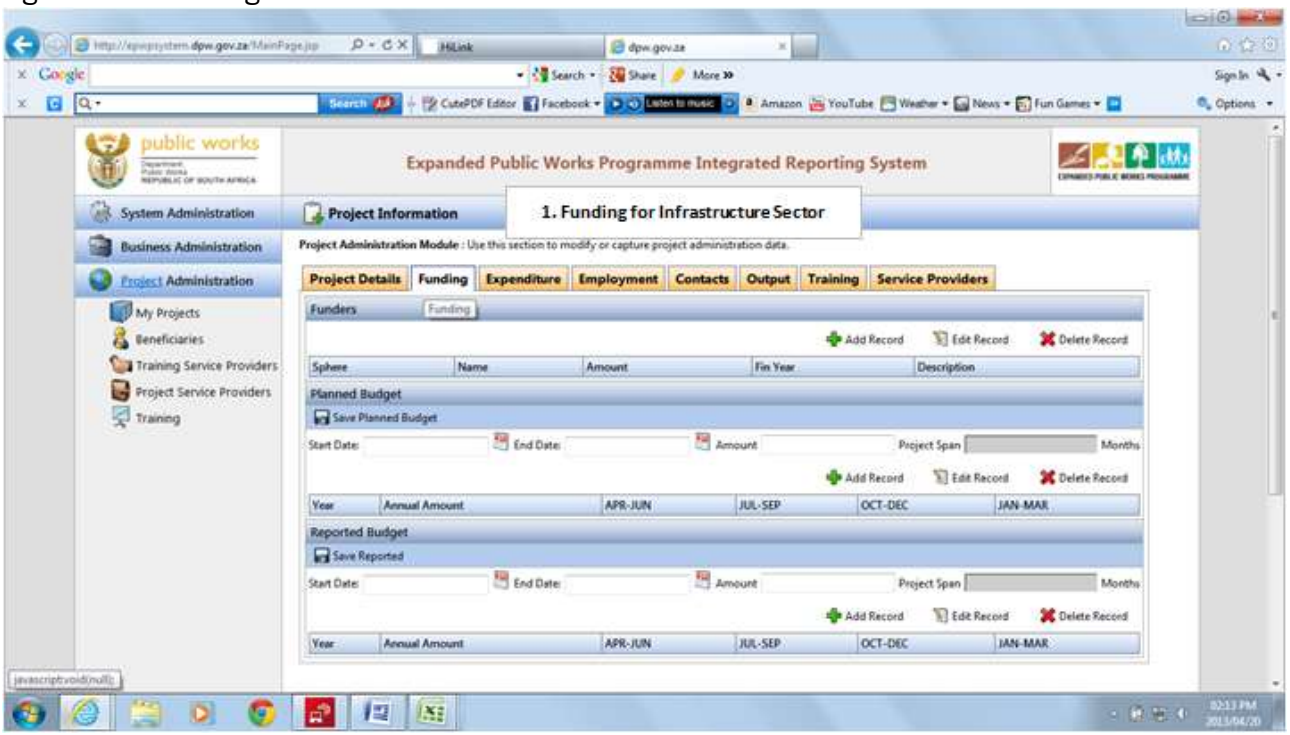
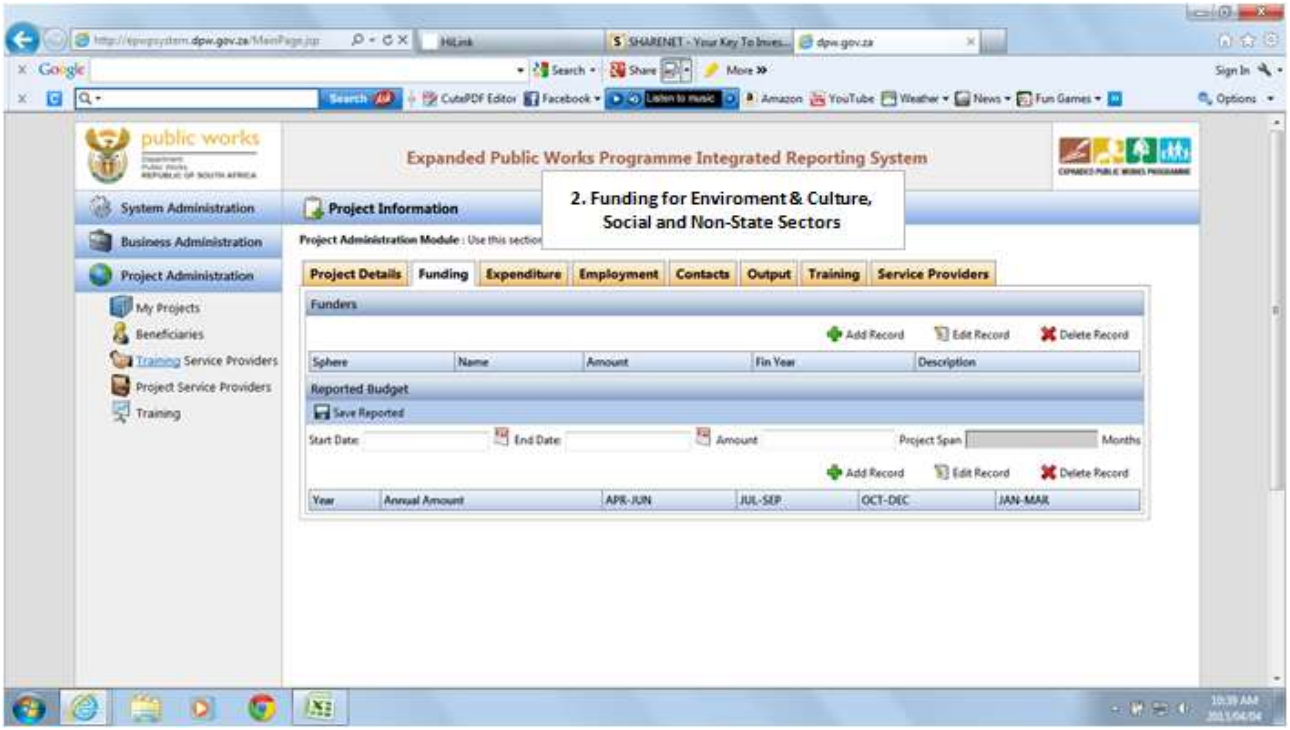


Figure 31-2: Funding Screen for Environment & Culture, Social and Non-State Sectors



6.4.3.2 PLEASE NOTE

It is important to always remember that data of a project has to be aligned with the Treasury annual financial reporting cycle. The Treasury annual financial reporting cycle starts on 1 April of each year and ends on 31 March in the subsequent year. For example, the 2013/14 financial year of EPWP started on the 1 April 2013 and ends 31 March 2014.

The funding data of our XN WS Water Supply project, therefore, has to be contextualised within the EPWP reporting cycle(s).

CONTEXT

The upgrade of the water supply between the Ntenetyana Dam and Mount Frere town will be undertaken over a seven (7) month period from 1 January 2013 to 31 July 2013 at a cost of R19 million.

We are currently (at 27 June 2013) capturing, for a project which commenced on 1 January 2013 and the expected date of completion is 31 July 2013. An amount of R19 million was budgeted for the implementation of this project, with the expectation that an amount of R3 million would be spent each month until the 30th of June 2013 and then R1 million would be spend in July 2013 – *see table 5*.

Table 5: Alignment of project data with the EPWP reporting period

PROJECT BUDGET DATA	
Calendar Year	2013
TOTAL AMOUNT	19 000 000
January	3 000 000
February	3 000 000
March	3 000 000
April	3 000 000
May	3 000 000
June	3 000 000
July	1 000 000
August	-
September	-
October	-
November	-
December	-

2012/13 EPWP REPORTING CYCLE = 9 000 000

2013/14 EPWP REPORTING CYCLE = 10 000 000

In terms of EPWP reporting, this budget runs over two EPWP financial periods – (i) the 2012/13 EPWP financial reporting period, and (ii) the 2013/14 EPWP financial reporting period. *Table 5* shows that the months of January, February and March fall under the 4th quarter of the 2012/13 EPWP reporting period, while the months of April, May, June and July fall under the 2013/14 EPWP reporting period.

The data for April, May and June fall under the 1st quarter of the 2013/14 EPWP reporting period, while the data for July falls under the 2nd quarter of the 2013/14 EPWP reporting period.

This data, therefore, has to be divided and captured accordingly.

Put differently, R9 million of this project has been budgeted for the 4th quarter of the 2012/13 EPWP reporting cycle:

Quarter 4: 2012/13

January 2013 – R3 million
February 2013 – R3 million
March 2013 – R3 million
Total – R9 million

And, remaining R10 million has been budgeted for the 1st and 2nd quarter of the 2013/14 EPWP reporting cycle:

Quarter 1: 2013/14

April 2013 – R3 million
May 2013 – R3 million
June 2013 – R3 million
Total – R9 million

Quarter 2: 2013/14

July 2013 – R1 million
August 2013 – R0 million
September 2013 – R0 million
Total – R1 million

Please note: In the 2nd quarter we have included the months of August and September for completeness only, otherwise they are not relevant in the case of this project.

In other words, this project runs over two financial periods for the purposes of EPWP reporting. While the total budgeted cost of the project is R19 million, it means that the first R9 million for Jan-Feb-Mar can be report as total budget for the 2012/13 EPWP reporting period, while final R10 million can be recognised for the 2013/14 EPWP reporting period. Furthermore, R9 million of the latter R10 million falls into the 1st quarter of 2013/14 and the remaining R1 million into the 2nd quarter.

In the sections that follow, we demonstrate how to correctly capture the above data for EPWP reporting purposes.

6.4.3.3 Funding – the capturing

Funders (applicable to all sectors)

This part is applicable to all the sectors.

Enter details of the entity that has provided funds for the project as it appears on the official documents. Enter funder(s) data as follows *(figure 33-1)*:

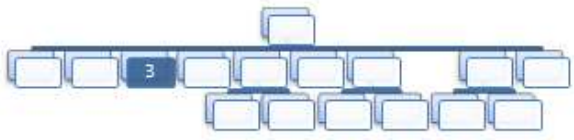
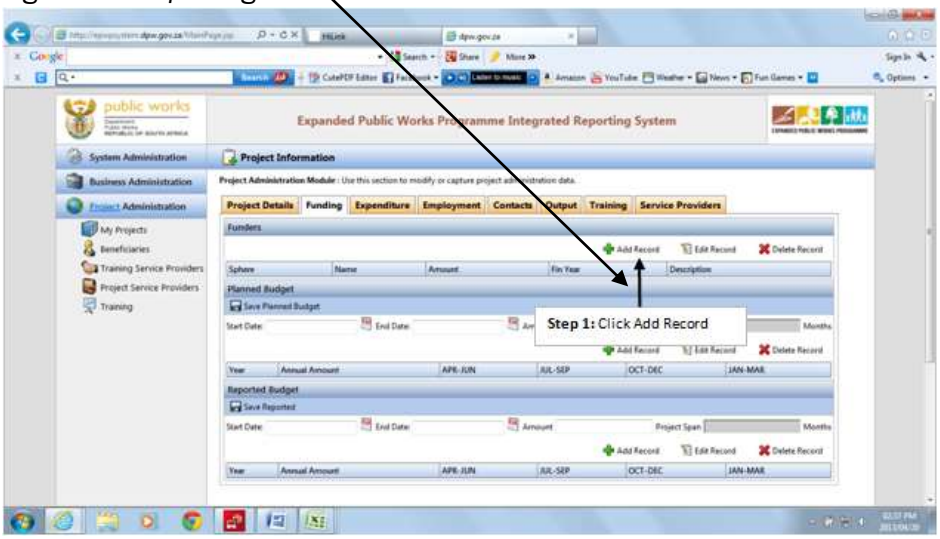


Figure 32: Components of EPWP IR System

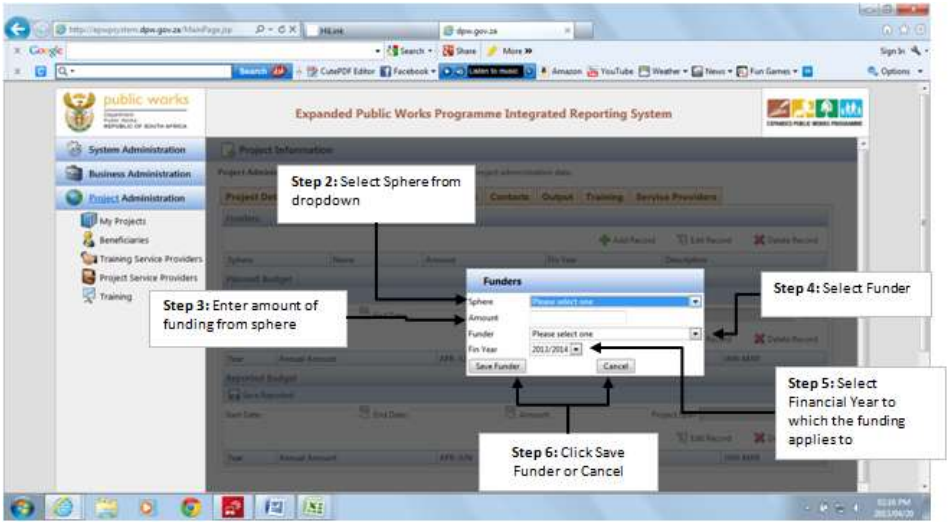
Step 1: **Click Add Record**.

Figure 33: Capturing Funder Details – Add Record



The system will open the window to capture funders' data *(figure 33-1)*.

Figure 33-1: Capturing Funder Details – Enter Funder Data


Expanded Public Works Programme Integrated Reporting System
Step 2: Select Sphere from dropdown
Step 3: Enter amount of funding from sphere
Step 4: Select Funder
Step 5: Select Financial Year to which the funding applies to
Step 6: Click Save Funder or Cancel
Funders

Thereafter, do the following steps:

Step 2. Enter the Sphere – which is Municipality

Step 3. Amount – R9 million (NB: this applies to the 2012/13 period)

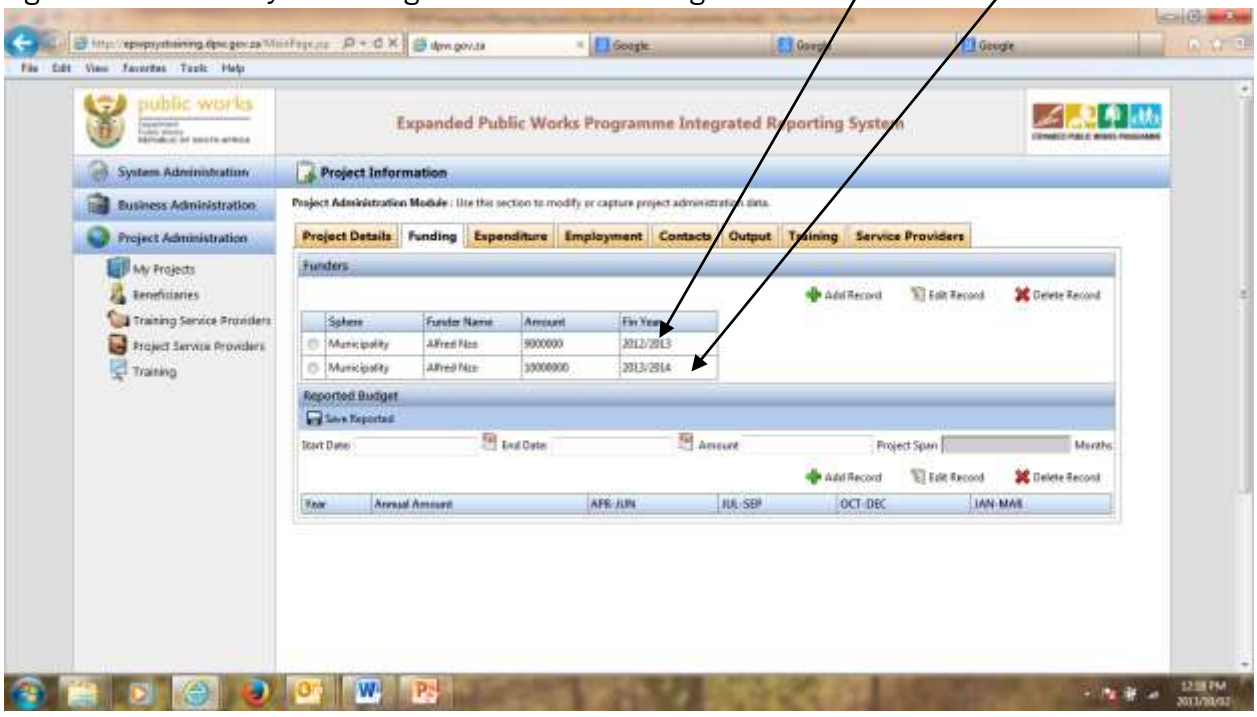
Step 4. Select Name of Funder from the dropdown list – which is Alfred Nzo

Step 5. Financial Year – the 2012/13 financial year to record for the months of January, February and March

Step 6: When finished click Save, otherwise Cancel

To capture the funded amount of R10 million for the 2013/14 financial repeat the same process from step 1 to step 6. Below screen shows the summary of the captured 2012/13 and 2013/14 Funding data after clicking *Save Funder*:

Figure 33-2: Summary of Funding Details – After clicking Save Funder



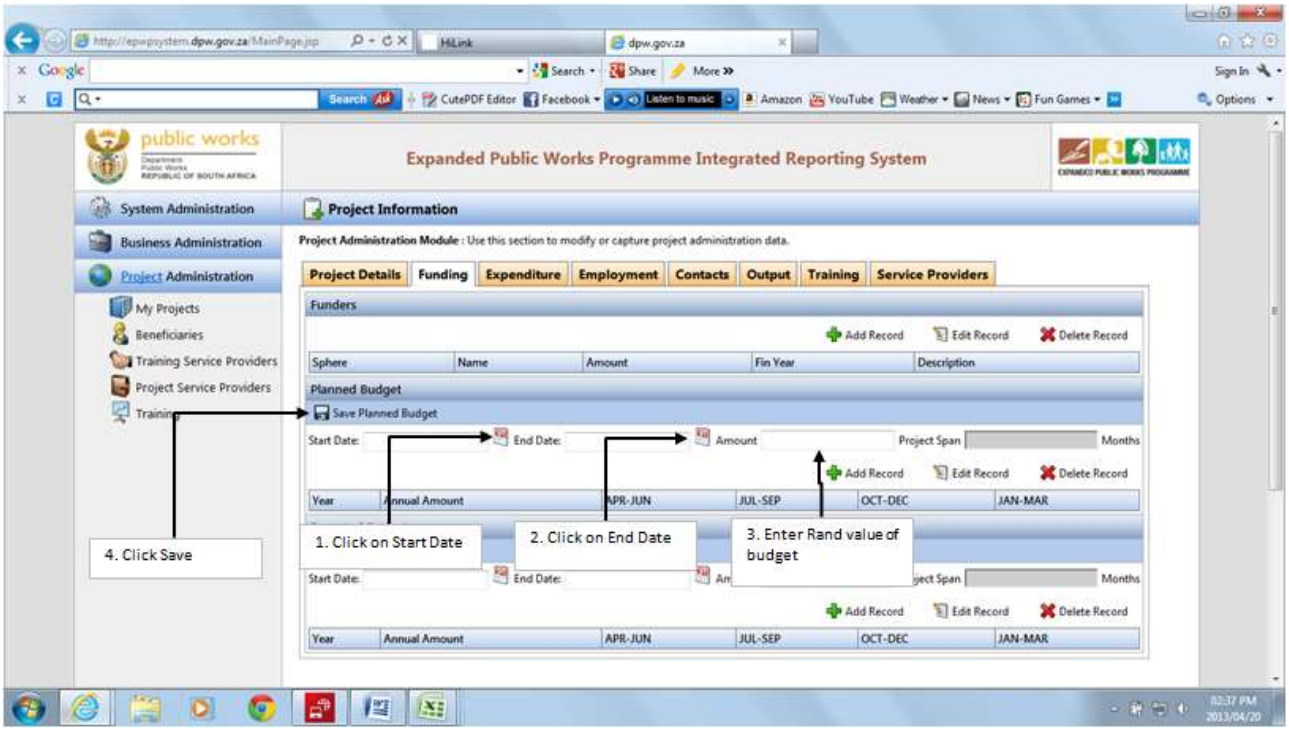
The above stated process on capturing Funding data should be followed appropriately. It is imperative to capture the correct Funding Body because they are the once receiving incentive payment for the project implemented. If a wrong Funder is captured, subsequently incentives will be paid to wrong institution or organisation. The financial years should be double checked during capturing. Incentive grants are *dispersed by National Department of Public Works* to qualifying Funding bodies. Capturers should capture the *Funder of the project* in the funding screen and ***NOT*** Department of Public Works.

Thereafter proceed to capture for Planned Budget and Reported Budget.

<u>Planned Budget (applicable to Infrastructure Sector)</u>

Please note that the method of capturing on the Planned Budget section and on the Reported Budget is exactly the same *(figure 33-3)*. The data capturing approach is as follows:

Figure 33-3: Steps to capturing Planned Budget Data



Step 1: Start Date – select date from the dropdown box (1 January 2013)

Step 2: End Date – select date from the dropdown box (31 July 2013)

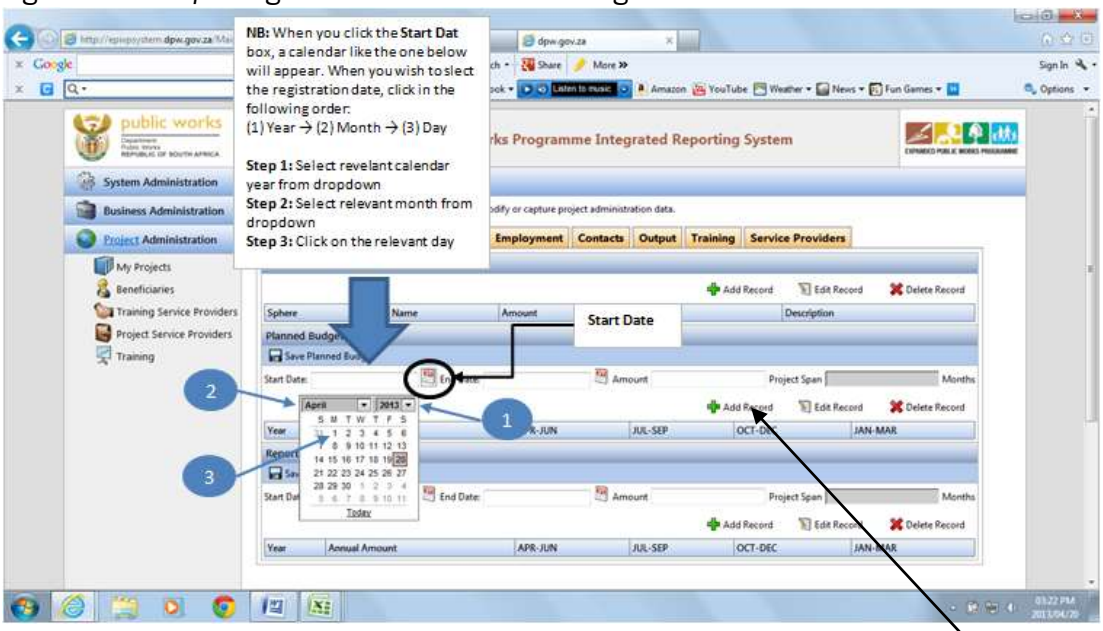
(Please refer to figure 33-3, below, to see how a date is captured on the system)

Step 3: Amount – enter the Rand value of the project, which is R19, million, as 19000000. The system will convert to the correct currency (rand). It is advisable to round figure the amounts captured.

Step 4: Click *Save* Planned Budget

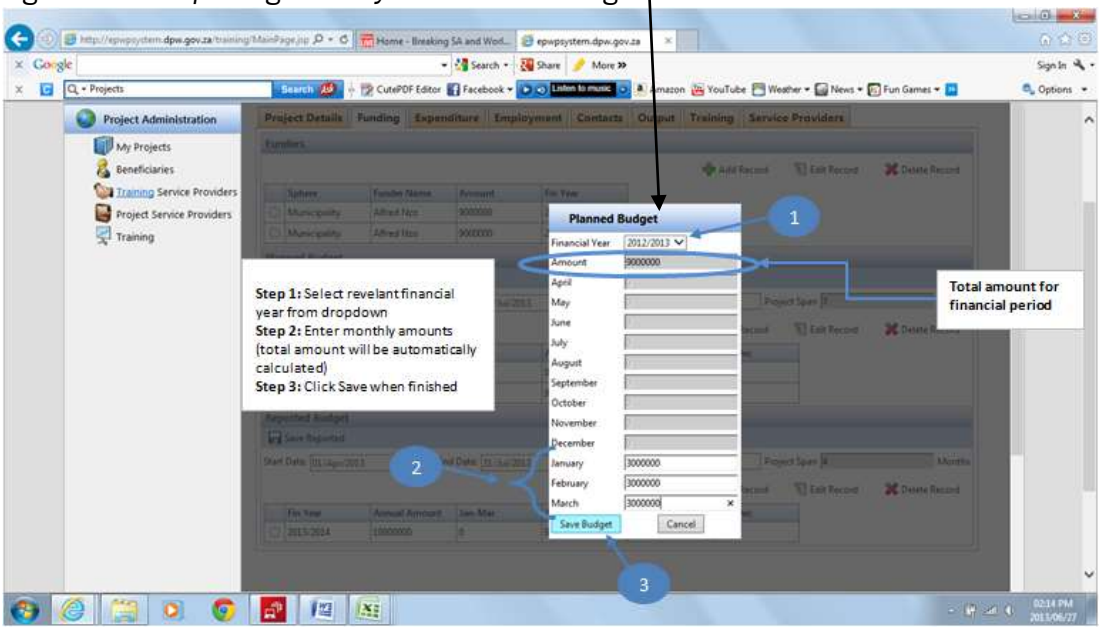
Please note that Project span is automatically calculated as soon as the start and end dates have been entered – e.g. if start = 1 January 2013 and end = 31 July 2013, then project span = 7 months.

Figure 33-4: Capturing Start and End Date of Budget


NB: When you click the Start Dat box, a calendar like the one below will appear. When you wish to slect the registration date, click in the following order:
(1) Year → (2) Month → (3) Day
Step 1: Select revelant calendar year from dropdown
Step 2: Select relevant month from dropdown
Step 3: Click on the relevant day
Start Date
1
2
3

Once Planned Budget has been saved, a pop-up box *(figure 33-5)* will appear and this will be for the month-to-month budget to be broken down / captured. If it does not appear, then **click on Add Record** and it will appear.

Figure 33-5: Capturing Monthly Cash flow of Budget


Planned Budget
Step 1: Select revelant financial year from dropdown
Step 2: Enter monthly amounts (total amount will be automatically calculated)
Step 3: Click Save when finished
Total amount for financial period
1
2
3

Please remember that we are still capturing the R9 million for the 4th quarter of the 2012/13 EPWP reporting period, which relates to the months of January, February and March 2013.

Quarter 4: 2012/13

January 2013 – R3 million

February 2013 – R3 million

March 2013 – R3 million

Total 2012/13 – R9 million

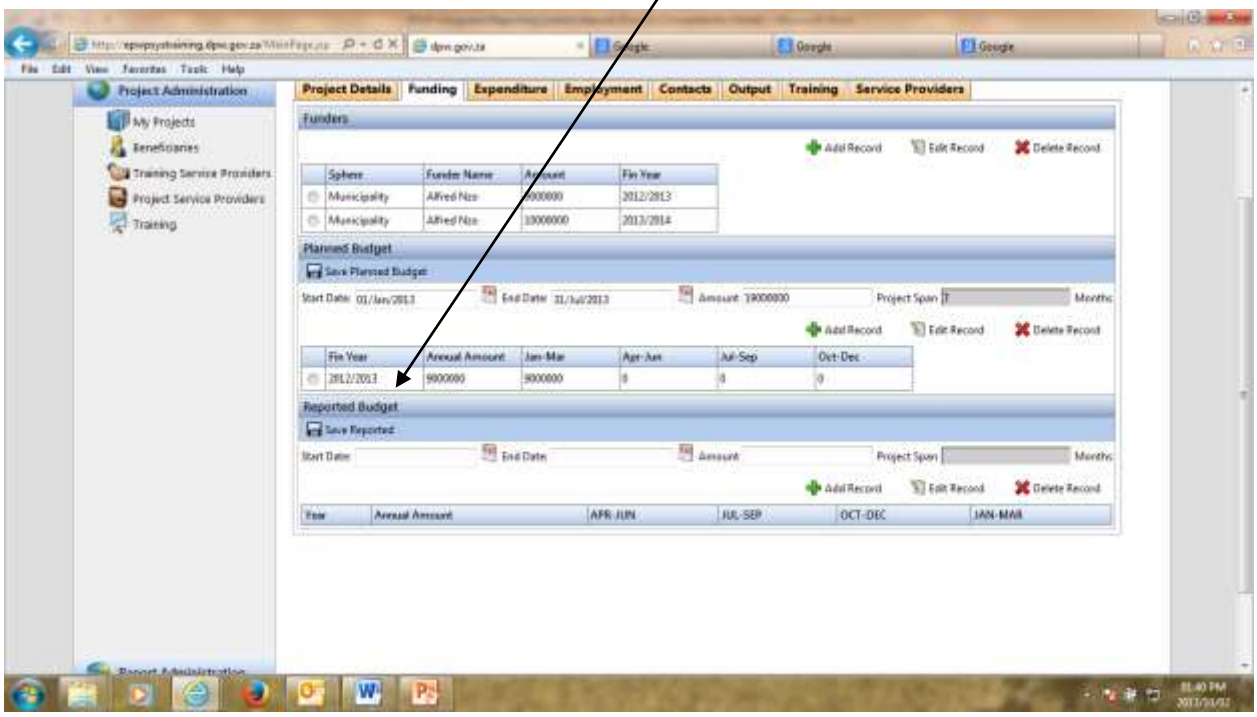
Step 1: Click Financial Year and select 2012/13 and the system will open for the months of January, February and March.

Step 2: Enter the relevant amounts in the opened fields as shown in the figure above.

Step 3: Click save, when finished. The system will show a message that the budget has been successfully saved and then click close.

The total amount of R9 million is shown in the grey field below the financial year of 2012/13. See below summary screen after clicking save:

Figure 33-6: Summary of Saved Planned Budget – 2012/13 (R9 million)



In the second leg, we shall capture for the amount of R10 million which has been budgeted for the 1st and 2nd quarter of the 2013/14 EPWP reporting cycle:

Quarter 1: 2013/14

April 2013 – R3 million

May 2013 – R3 million

June 2013 – R3 million

Total – R9 million

Quarter 2: 2013/14

July 2013 – R1 million

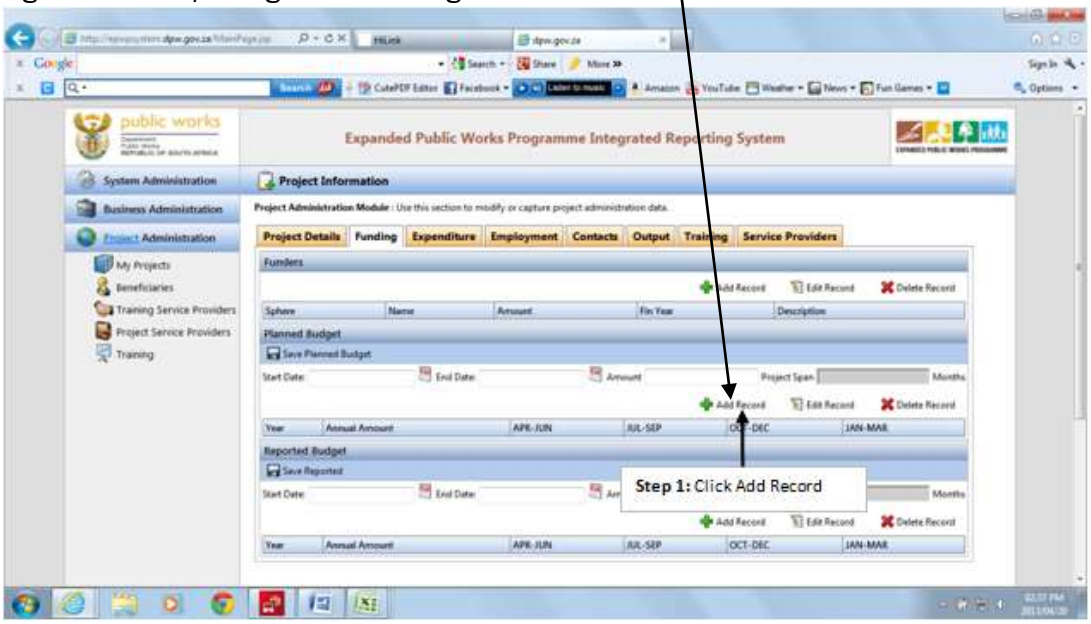
August 2013 – R0 million

September 2013 – R0 million

Total – R1 million

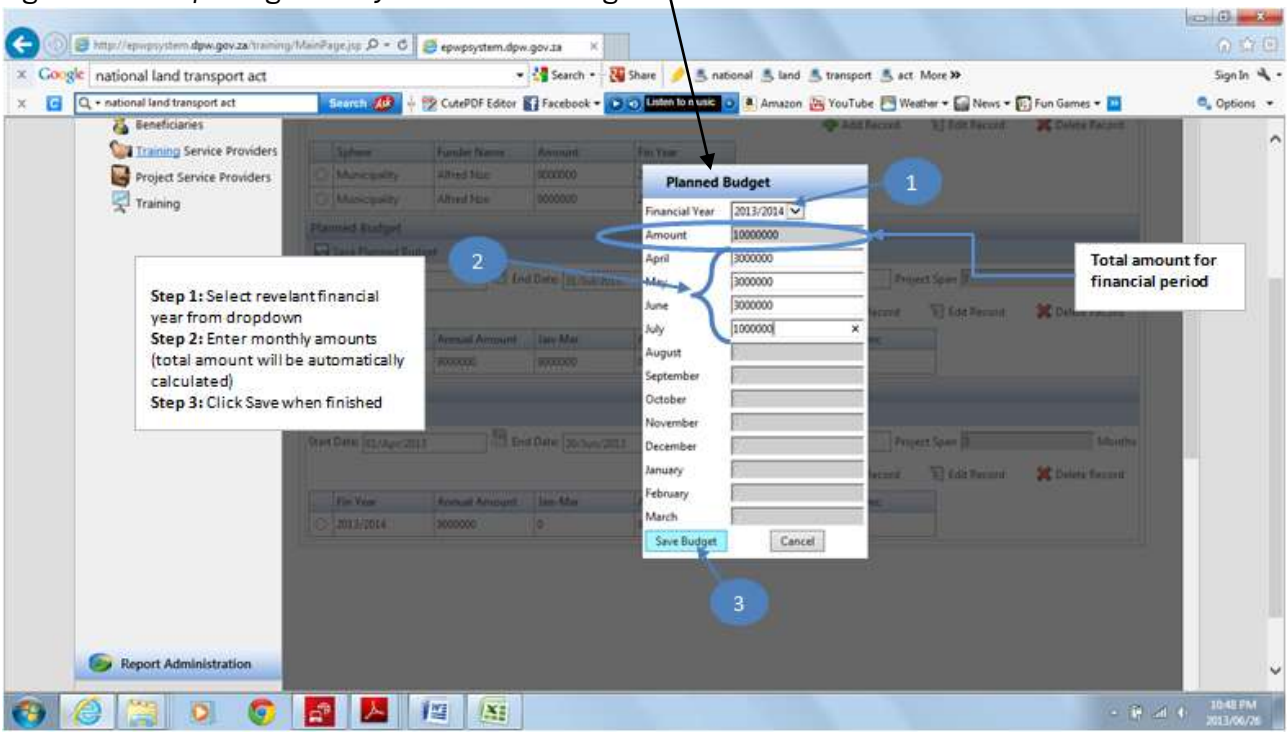
To capture for the 2013/14 financial period **click Add Record**, again.

Figure 33-7: Capturing Planned Budget



Once Add Record has been clicked, a pop-up box *(figure 33-8)* will appear and this will be for the month-to-month budget to be broken down / captured.

Figure 33-8: Capturing Monthly Cash flow of Budget



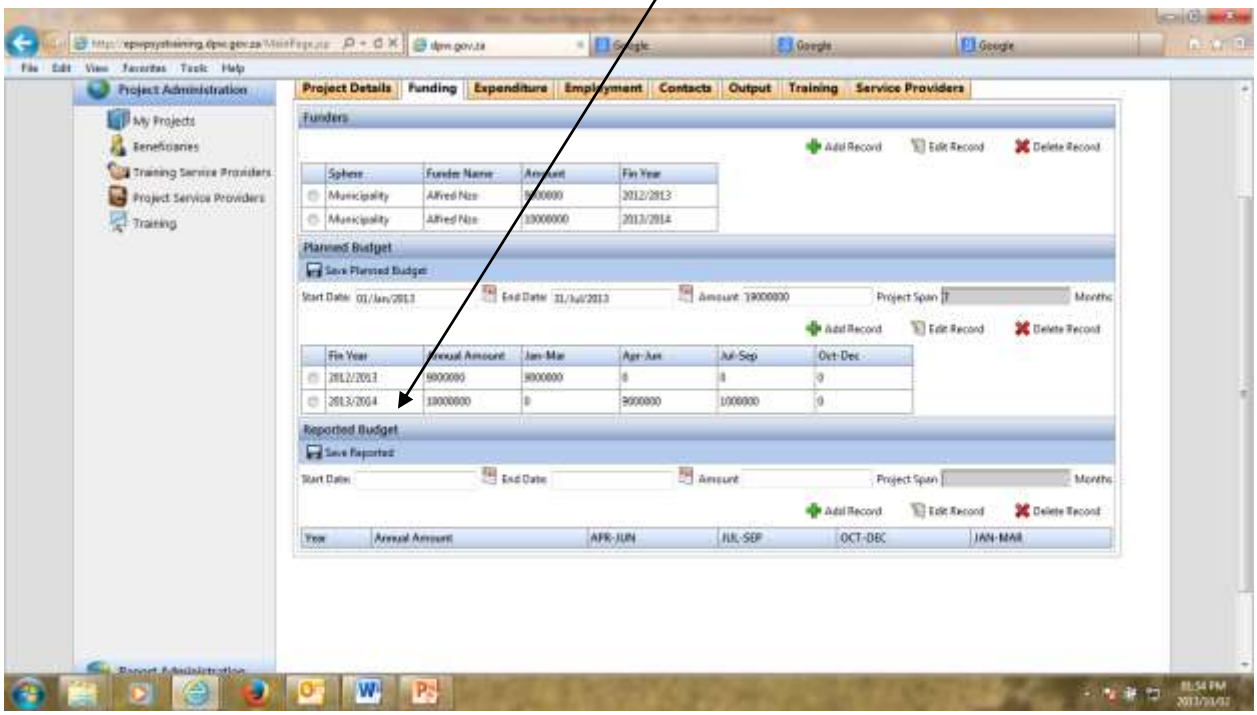
The procedure of capturing is exactly the same as that shown above:

Step 1: Click Financial Year and select 2013/14 and the system will open for the months of April, May, June and July.

Step 2: Enter the relevant amounts in the opened fields as shown in the figure above.

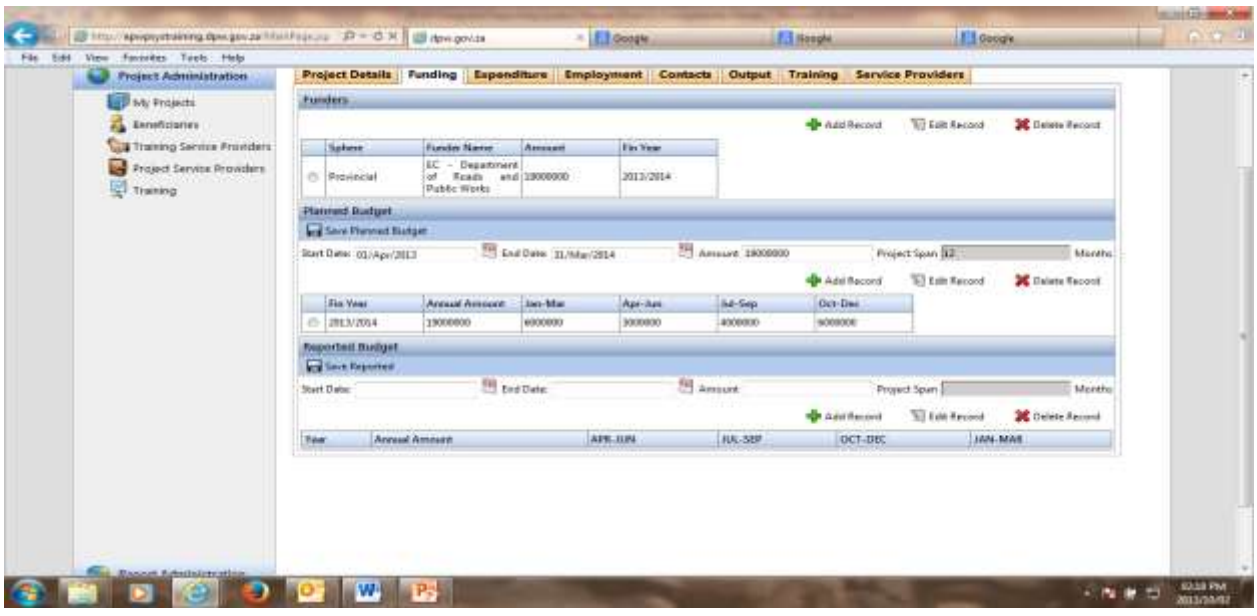
Step 3: Click save, when finished. The system will show a message that the budget has been successfully saved and then click close. The total amount of R10 million is shown in the grey field (see figure 33-8) below the financial year of 2013/14. See below Planned Budget summary after clicking Save Budget - 2013/14:

Figure 33-9: Summary of Saved Planned Budget – 2013/14 (R10 million)



We have now captured the R19 million budget of Water Supply upgrade between Ntenetyana Dam and the town of Mount Frere, by correctly classifying it in the relevant periods as shown above. *It should be noted that if the project is implemented within 1 Treasury financial year or less especially from 1st April – 31st March; the Funding summary should be broken down accordingly and reflects as follows:*

Figure 33-10: Summary of Saved Planned Budget – 2013/14 (R19 million)

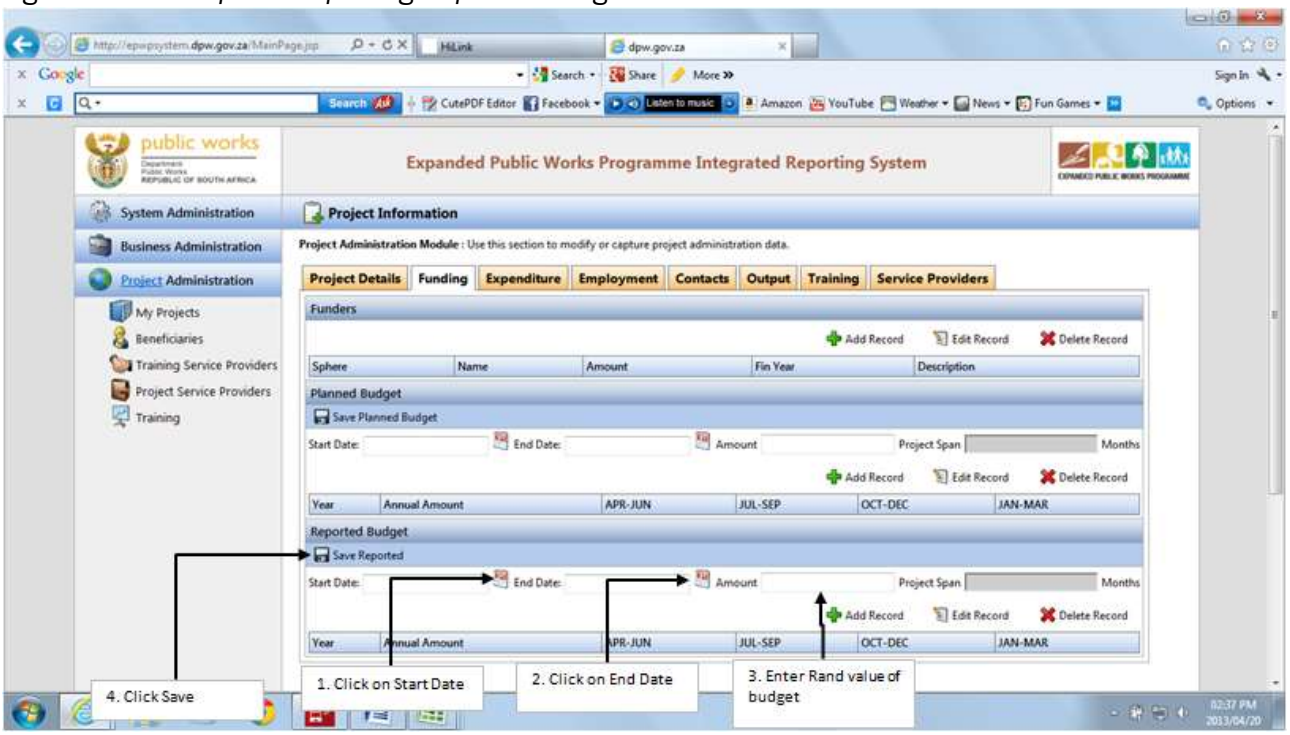


Reported Budget (applicable to All Sectors)

Please note that the method of capturing on the Planned Budget section and on the Reported Budget is exactly the same *(figure 33-11)*, but there are important differences due to the nature of this Water Supply upgrade project that we are capturing.

The most important difference is that under Reported Budget we are dealing with the current EPWP reporting period data only – this is 2013/14. As a result of this our start date will be 1 April 2013, instead of 1 January 2013, because the start date of the 2013/14 Treasury period is 1 April 2013. In other words, we shall exclude project data that does not belong to this (2013/14) financial year.

Figure 33-11: Steps for capturing Reported Budget Data



The procedure is as follows:

Step 1: Start Date – select date from the dropdown box (1 April 2013)

Step 2: End Date – select date from the dropdown box (31 July 2013). The end date remains the same, even though the EPWP reporting period end on 31 March 2014.

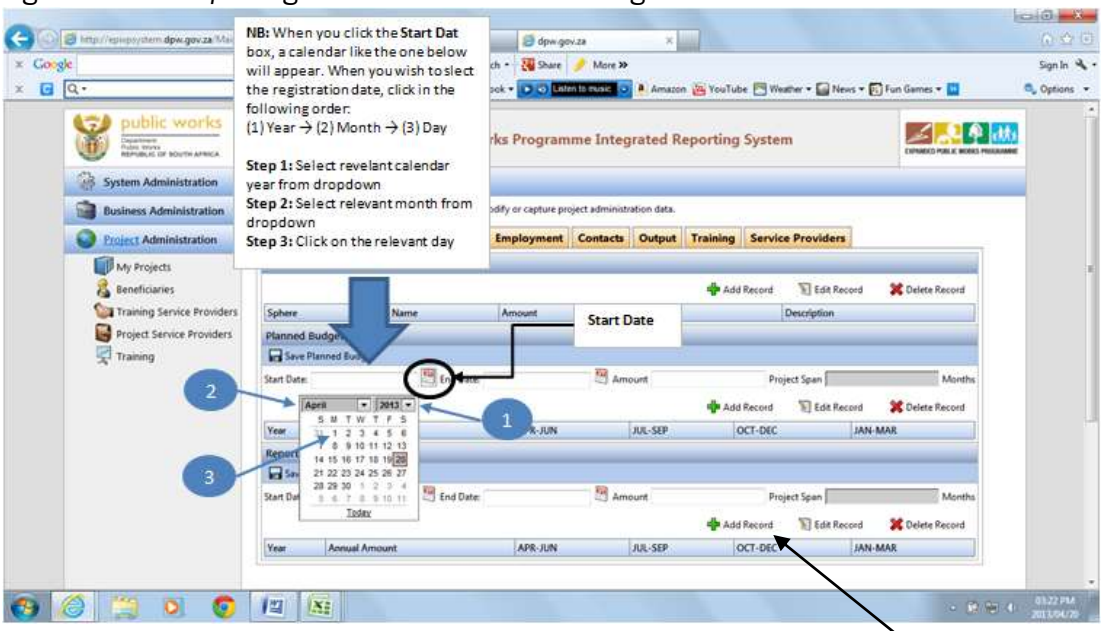
(Please refer to figure 33-12, below, to see how a date is captured on the system)

Step 3: Amount – enter the Rand value of the project, which is R10, million, as 10000000

Step 4: Click *Save* Planned Budget

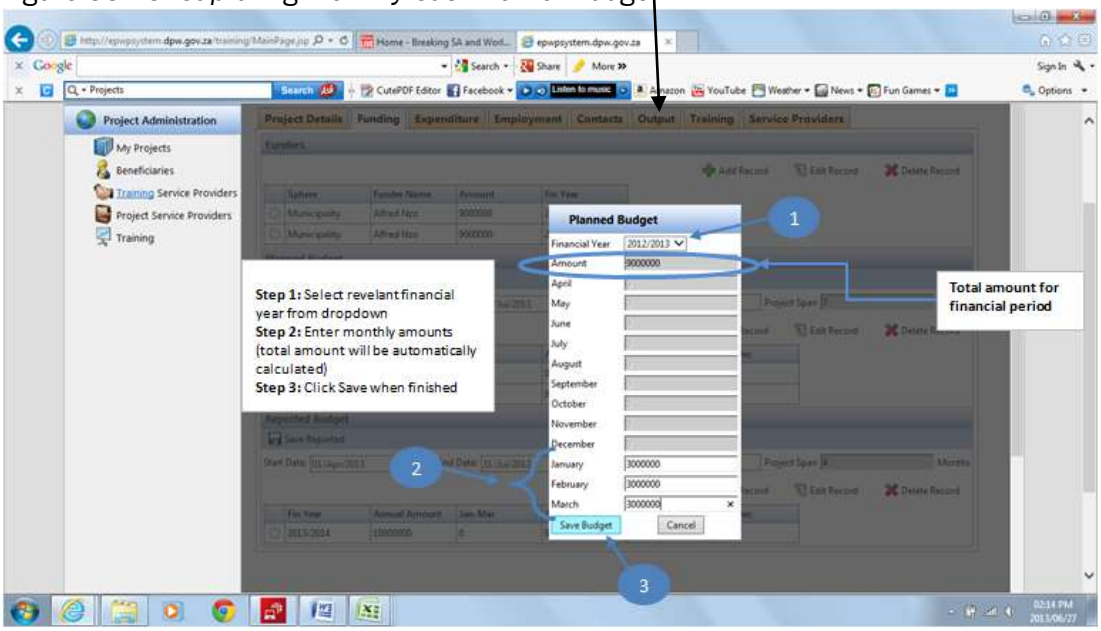
Please note that Project span is automatically calculated and populated as soon as the start and end dates have been entered – e.g. if start = 1 April 2013 and end = 31 July 2013, then project span = 4 months.

Figure 33-12: Capturing Start and End Date of Budget


NB: When you click the Start Dat box, a calendar like the one below will appear. When you wish to slect the registration date, click in the following order:
(1) Year → (2) Month → (3) Day
Step 1: Select revelant calendar year from dropdown
Step 2: Select relevant month from dropdown
Step 3: Click on the relevant day
Start Date
1
2
3

Once Reported Budget has been saved, a pop-up box *(figure 33-13)* will appear and this will be for the month-to-month budget to be captured. If it does not appear, then **click on Add Record** and it will appear. NB: It is compulsory to breakdown the month to month budget as final reported figures are retrieved from below broken down table. If not broken down, your report will not reflect the budget figure.

Figure 33-13: Capturing Monthly Cash flow of Budget


Planned Budget
Step 1: Select revelant financial year from dropdown
Step 2: Enter monthly amounts (total amount will be automatically calculated)
Step 3: Click Save when finished
Total amount for financial period
1
2
3

Please remember that we are capturing the R10 million for the 1st and 2nd quarter of the 2013/14 EPWP reporting period, which relates to the months of April, May, June and July 2013.

Quarter 1: 2013/14

April 2013 – R3 million

May 2013 – R3 million

June 2013 – R3 million

Total – R9 million

Quarter 2: 2013/14

July 2013 – R1 million

August 2013 – R0 million

September 2013 – R0 million

Total – R1 million

The procedure is as follows:

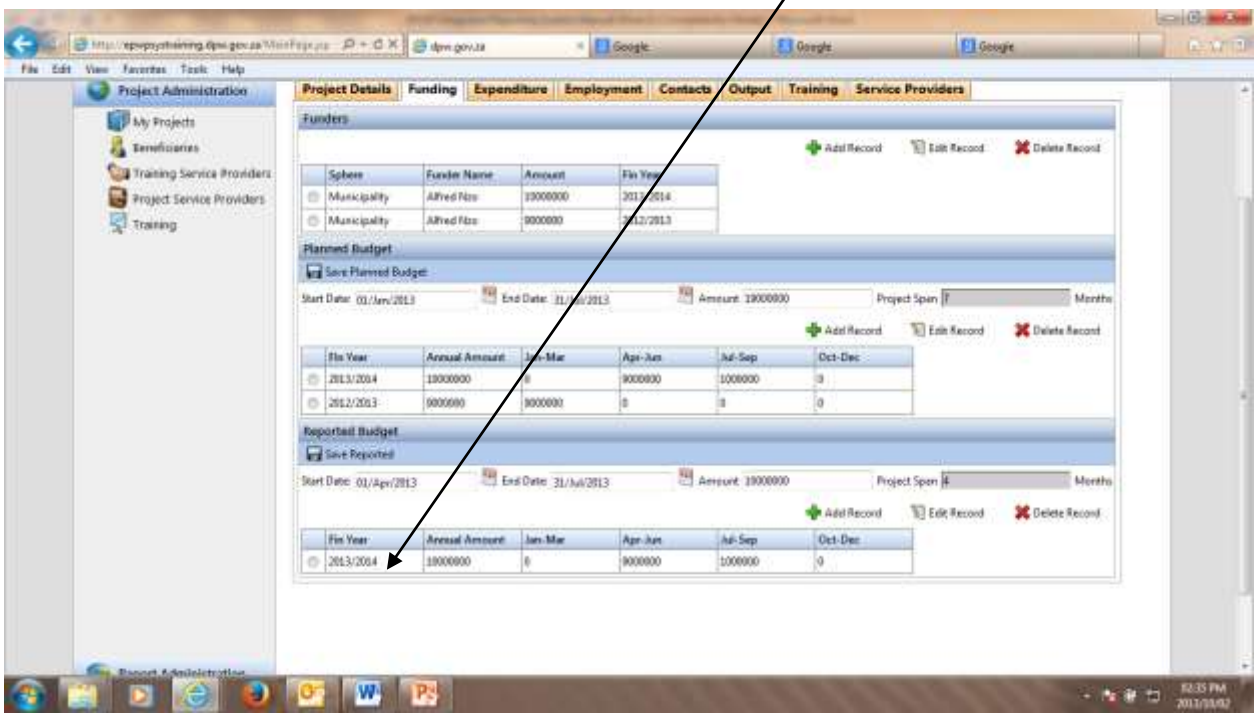
Step 1: Click Financial Year and select 2013/14 and the system will open for the months of April, May, June and July.

Step 2: Enter the relevant amounts in the opened fields as shown in the figure above.

Step 3: Click save, when finished. The system will show a message that the budget has been successfully saved and then click close.

The total amount of R10 million is shown in the grey field below the financial year of 2013/14. Thereafter a summary of captured Reported Budget will appear as follows:

Figure 33-14: Summary of Saved Reported Budget 2013/14 (R10 million)



The above screen reflects all data fields captured from Funder, Planned Budget and Reported Budget. It should be noted that after breaking down budget data, a summary should reflects below. If the summary is not reflected it means that the capturer did not break down the budget or did not save data after breaking down the budget.

Definition of Planned and Reported Budget

- **Planned Project Budget:** Is the overall project costs allocated for the **entire** project span (inclusive of stipend)
- **Reported Project Budget:** Is the annual costs allocated for the project (inclusive of stipend)

6.4.4 EXPENDITURE

Introduction

It is only expenditure (wages & no-wages) that has been incurred that has to be captured in this section. Expenditure to be captured, therefore, relates to the current quarter money spent of the 2013/14 EPWP financial year only. Since we are in the month of June 2013, only expenditure up to the 31st of May 2013 can be captured.

The expenditure data of our XN WS Water Supply project, therefore, has to be contextualised within the EPWP reporting cycle.

CONTEXT

The upgrade of the water supply between the Ntenetyana Dam and Mount Frere town incurred total expenditure of R15 million between 1 January 2013 and 31 May 2013.

We are currently (at 27 June 2013) capturing, for the project which commenced on 1 January 2013. An amount of R15 million was utilised during the period to 31 May 2013 in the implementation of this project – *see column A of table 6*. *Table 6* shows how the actual amounts of monthly expenditure incurred have been divided into the 2012/13 (column B) and 2013/14 (column C) financial periods.

Table 6: Alignment of project data with the EPWP reporting period

PROJECT EXPENDITURE DATA	COLUMN A	COLUMN B	COLUMN C
Calendar OR FY Year	2013	2012/13	2013/14
TOTAL AMOUNT	15 000 000	9 000 000	6 000 000
	Monthly	**Cumulative**	**Cumulative**
January	3 000 000	3 000 000	-
February	3 000 000	3 000 000	
March	3 000 000	3 000 000	-
April	3 000 000	-	3 000 000
May	3 000 000	-	3 000 000
June	-	-	-
July	-	-	-
August	-	-	-
September	-	-	-
October	-	-	-
November	-	-	-
December	-	-	-

2012/13 EPWP REPORTING CYCLE = 9 000 000

2013/14 EPWP REPORTING CYCLE = 6 000 000

Expenditure of R9 million, which was incurred during the months of January, February and March of 2013, belongs to the 4th quarter of the 2012/13 EPWP reporting cycle. Expenditure of R6 million that was incurred during the months of April and May of 2013 belongs to the 1st quarter of the 2013/14 EPWP reporting cycle. The captured end date on the expenditure screen should always be the ***last day of the quarter*** to allow the system to accommodate updates on all three months in a quarter. As shown in Table 6, the expenditure breakdown for 2013/14 will reflect R3000 000 in April; R3000 000 in May and R0 in June.

THE CAPTURING PROCESS

Although there are similarities on how you capture under expenditure and funding, there are important differences in what is captured:

- Only actual amounts spent during the current reporting quarter can be captured.
- Only expenditure of the preceding month can be captured. Since for the XN WS Water Supply period we are capturing in June 2013, only expenditure up to the end of 31 May can be captured on the system.

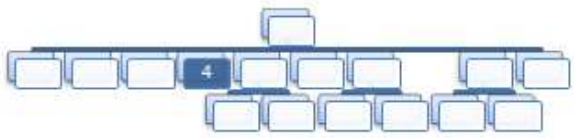
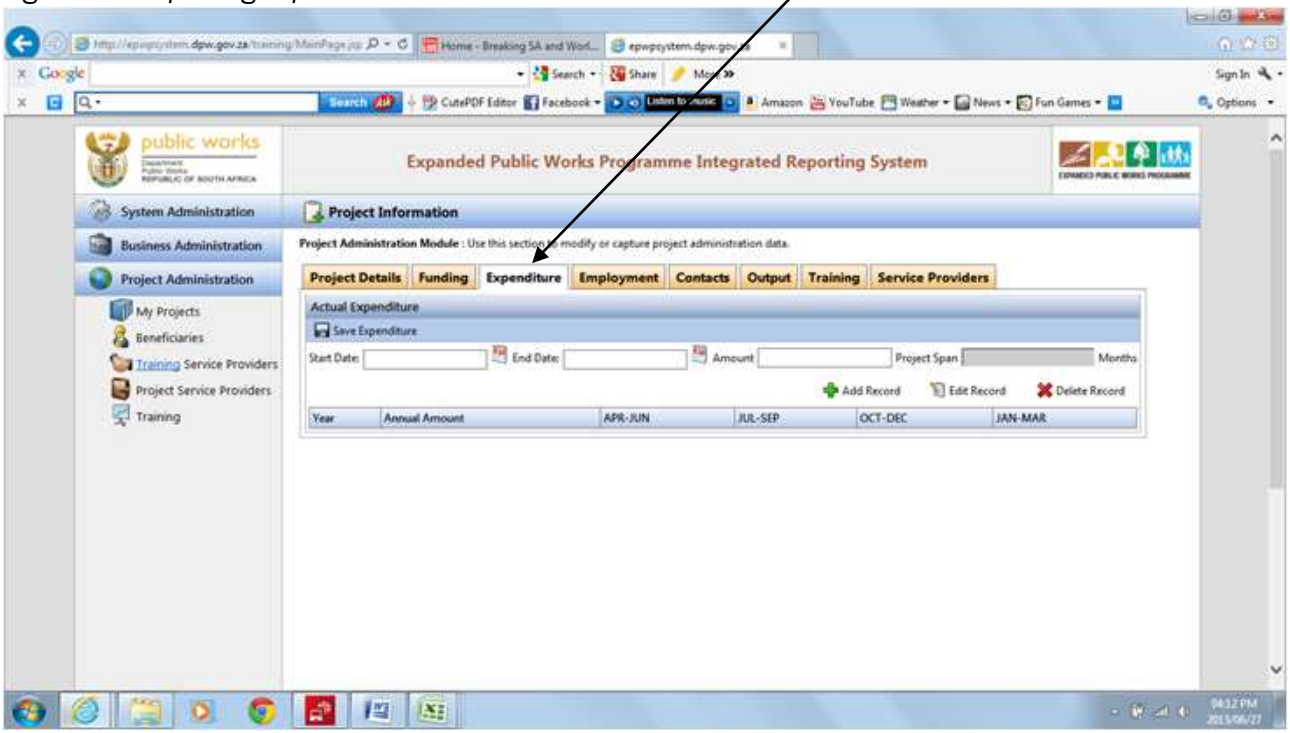


Figure 34: Components of EPWP IR System

To capture expenditure data of a project, make sure that the **expenditure tab** is active.

Figure 35: Capturing expenditure



The method of capturing current expenditure data is as follows (please read with the steps in *figure 35-1*):

Step 1: Click Start Date calendar and enter date (1 April 2013)

Step 2: Click End Date calendar and enter date (31 May 2013)

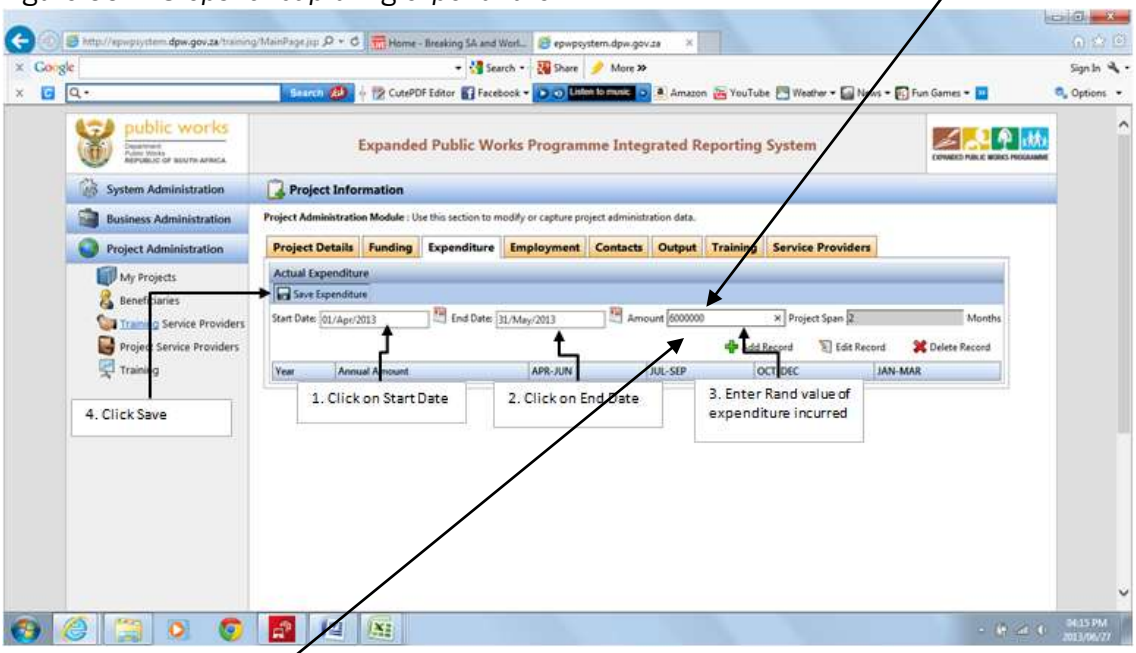
Project Span is automatically calculated as soon as the start and end dates have been entered – e.g. if start is 1 April 2013 and end is 31 May 2013, then project span is 2 months.

Please note that the process of capturing a date is exactly the same as that show under funding – you start by clicking on the red calendar icon.

Step 3: Enter Amount – which is the Rand Value of spent (R6m – 6000000)

Please note, the amount of expenditure that has to be captured in this field is **the cumulative amount**, which is R6 million.

Figure 35-1: Steps for capturing expenditure



The amount of **R6 million** relates to the actual expenditure incurred in April and in May 2013, as shown in *table 7*, below.

Table 7: Alignment of project data with the EPWP reporting period

PROJECT EXPENDITURE DATA	COLUMN A	COLUMN B	COLUMN C
Calendar OR FY Year	2013	2012/13	2013/14
TOTAL AMOUNT	15 000 000	9 000 000	6 000 000
	Monthly	**Cumulative**	**Cumulative**
January	3 000 000	3 000 000	-
February	3 000 000	3 000 000	
March	3 000 000	3 000 000	-
April	3 000 000	-	3 000 000
May	3 000 000	-	3 000 000
June	-	-	-
July	-	-	-
August	-	-	-
September	-	-	-
October	-	-	-
November	-	-	-
December	-	-	-

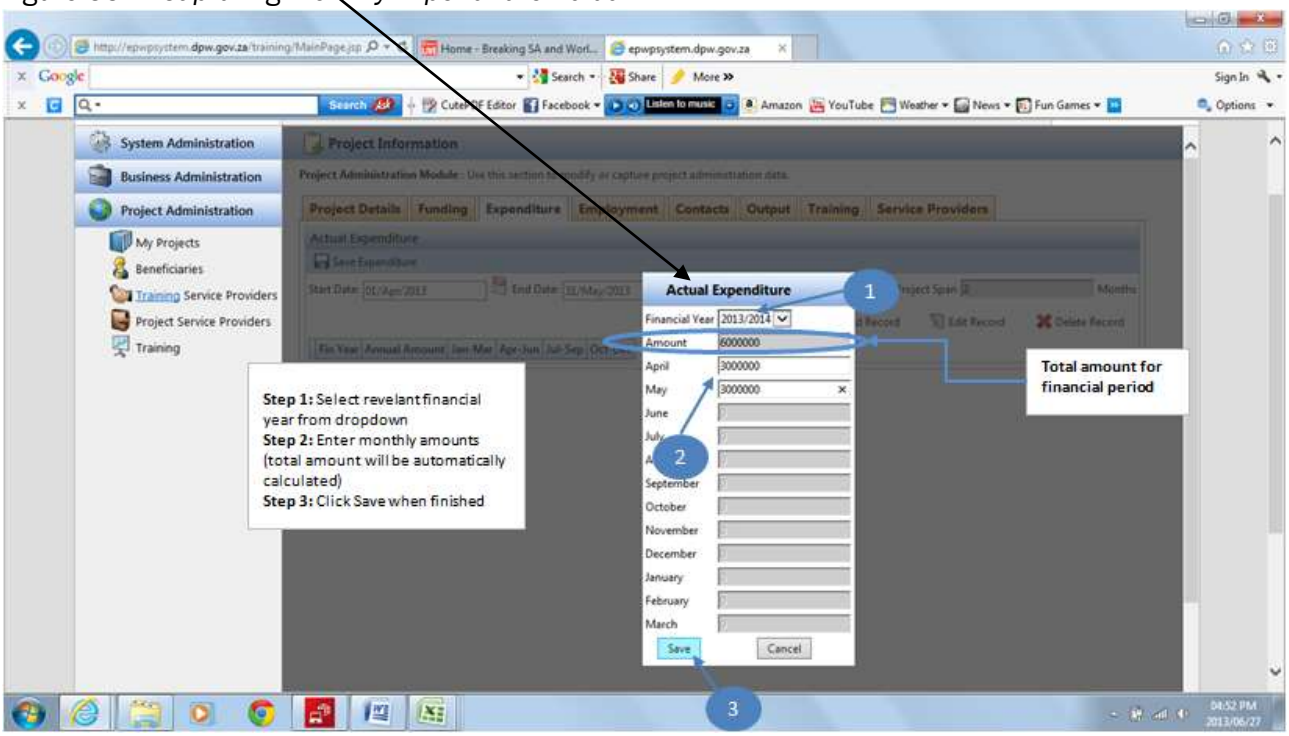
2012/13 EPWP REPORTING CYCLE = 9 000 000

2013/14 EPWP REPORTING CYCLE = 6 000 000

Step 4: Click Save, when finished

Once Expenditure has been saved, a pop-up box *(figure 35-2)* will appear and this will be for the month-to-month expenditure to be captured. If it does not appear, then **click on Add Record** and it will appear.

Figure 35-2: Capturing Monthly Expenditure-Actual



Please remember that we are capturing the R6 million for the months of April and May 2013, which belong to the 2013/14 EPWP reporting period.

Quarter 1: 2013/14

April 2013	– R3 million
May 2013	– R3 million
June 2013	– R0 million
Total	– R6 million

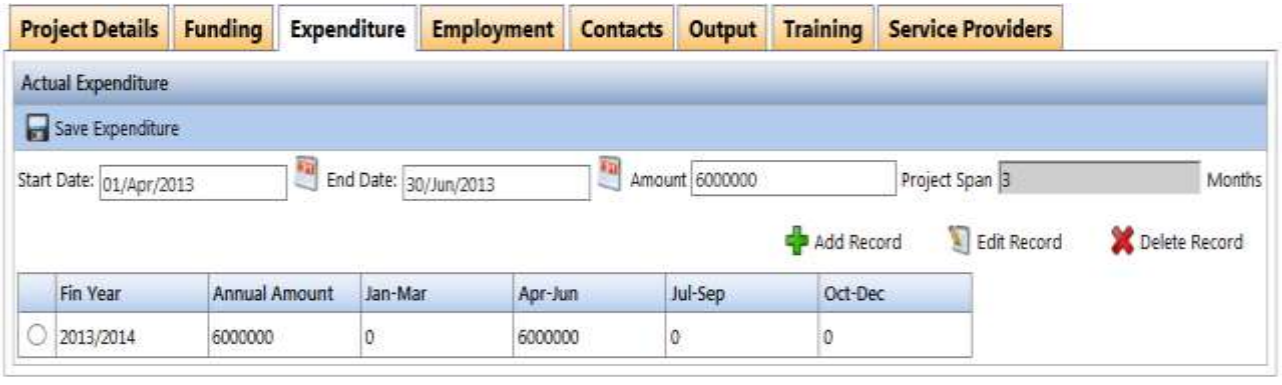
The procedure is as follows:

Step 1: Click Financial Year and select 2013/14 and the system will open for the months of April and May.

Step 2: Enter the relevant amounts in the opened fields as shown in the figure above.

Step 3: Click save, when finished. The system will show a message that the budget has been successfully saved and then click close.

See below summary of the total amount of R6 million spent in April and May 2013/14:

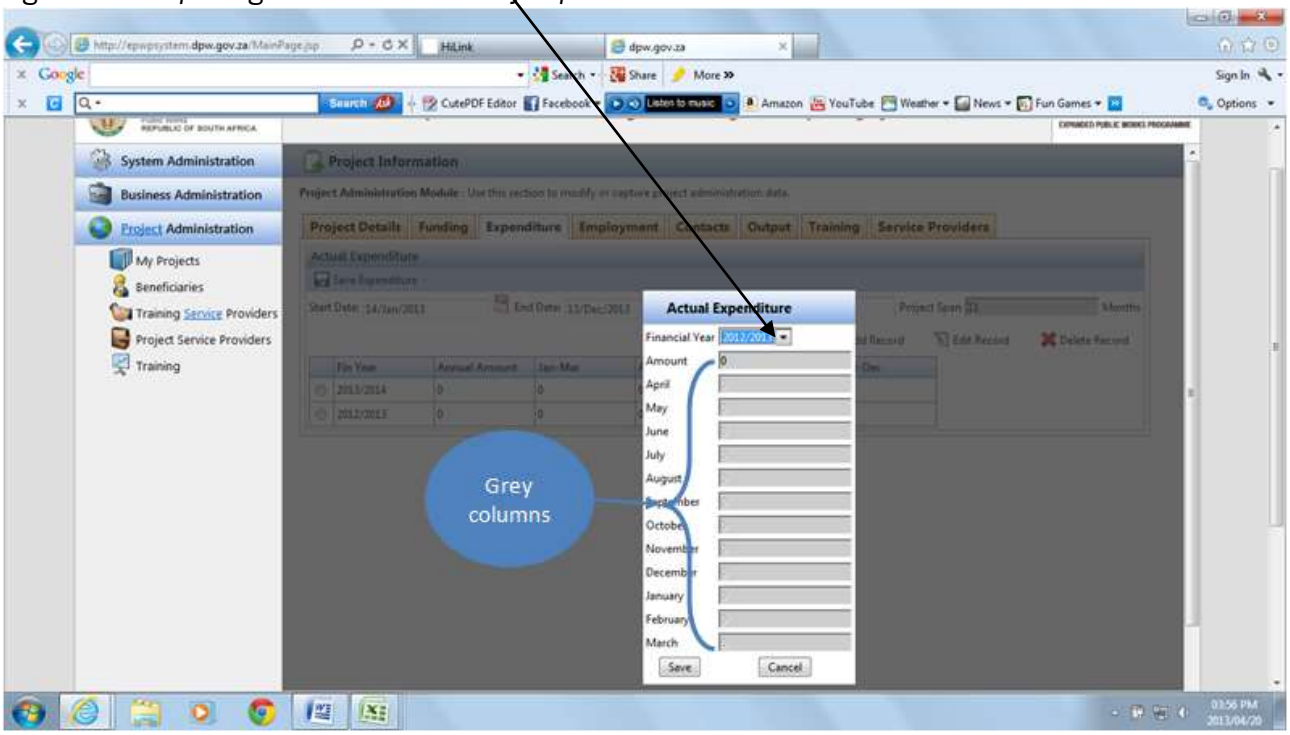


Common problems when capturing Expenditure Data

It is common that when the month expenditure window opens, all the monthly fields are in grey. For example, when we want to capture for the 2013/14 financial year, all fields are in grey when it first opens. This means that the system does not allow any capturing to take place.

To activate this, select previous financial year like 2012/13, it will also be grey as show below. Thereafter, select the required financial year, which is 2013/14 in this case, and the monthly fields of the relevant quarter should open.

Figure 35-3: Opening the fields of monthly expenditure data



Definition of Expenditure

- **Project Expenditure:** Is the o*verall costs spent for the project (wages & non wages)*

NB: 1. The Start date is captured once in the expenditure screen.

2. The end date must be updated using the **last day of that specific quarter** e.g. (Q1: 30 June; Q2:30 September; Q3: 31 December and Q4: 31 March) to allow the system to avail correct months within.

3. Expenditure MUST be updated on a monthly basis and thereafter cumulated as shown above in figure 35-1

4. It should be noted that the system reflects the month to month broken down figure as a final expenditure for a project therefore cumulated figures should also be broken down on a monthly basis.

NB: It is compulsory to breakdown the month to month expenditure, as final reported expenditure figures are retrieved accrued from the above broken down table. If not broken down, your report will not reflect the expenditure figure.

6.4.5 EMPLOYMENT

Introduction

This section will allow you to add and manage beneficiaries linked to a particular project. You will not be able to capture new beneficiary details in this section, but would rather do so in the *Beneficiary* database section.

The employment section is divided into two parts – for planning purpose of the entire project duration, under **Planned Employment** and for capturing actual beneficiaries that worked in that particular period (month), under **Actual Employment**.

Column A of *table 8* shows that there are 15 240 person days that would result from this project between 1 January and 31 July 2013. The total person days of 15 240 are based on 120 beneficiaries that would work for 20 days on the project between January and June, as well as 7 days in July 2013.

Definition of Person days of work

- **Person days of work:** The number of people who worked on a project times the number of days each person worked.
- The above calculations and as reflected in Table 8 are based on the following formula:
- **Person days per month (Planned)** = Number of beneficiaries x days works.
- **Person days of the project (Planned)** = person days per month x duration of the project in months.

- (120 Beneficiaries X 20 days X 6 months Jan-June) + (120 Beneficiaries X 7 days in July)
- (120 X 20 X 6) + (120 X 7)
- (14 400) + (840)= 15 240
- 15 240 Planned Person-days of work to be captured

Planned Employment: Is the planning of envisage beneficiaries to be contracted in a project for the entire project duration and is captured once but updated when there is a need.

Actual Employment: Is participated contracted beneficiaries and updated on a monthly basis

The Planned employment data is for the entire project duration. It can be updated as the project is reviewed or amended. This data assist in the planning of beneficiary implementation process. The anticipated number of beneficiaries to be involved in a project plus anticipated number of days to work and duration (how long) is taken into consideration when calculating the person days of work.

Table 8: Alignment of project data with the EPWP reporting period

PROJECT EMPLOYMENT DATA			COLUMN A		COLUMN B		COLUMN C
Calendar OR FY Year			2013		2012/13		2013/14
TOTAL PERSON DAYS			15 240		7 200		8 040
	Beneficiaries	Days	Person days		Person days		Person days
January	120	20	2 400		2 400		-
February	120	20	2 400		2 400		
March	120	20	2 400		2 400		-
April	120	20	2 400		-		2 400
May	120	20	2 400		-		2 400
June	120	20	2 400		-		2 400
July	120	7	840		-		840
August	-	-	-		-		-
September	-	-	-		-		-
October	-	-	-		-		-
November	-	-	-		-		-
December	-	-	-		-		-

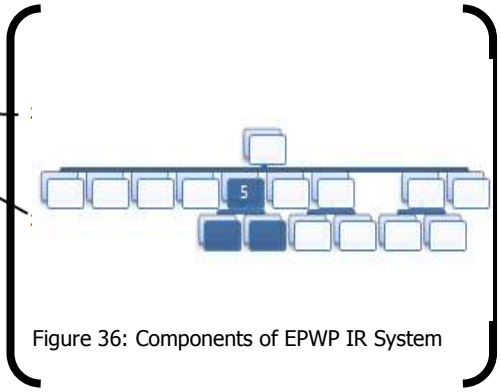


Figure 36: Components of EPWP IR System

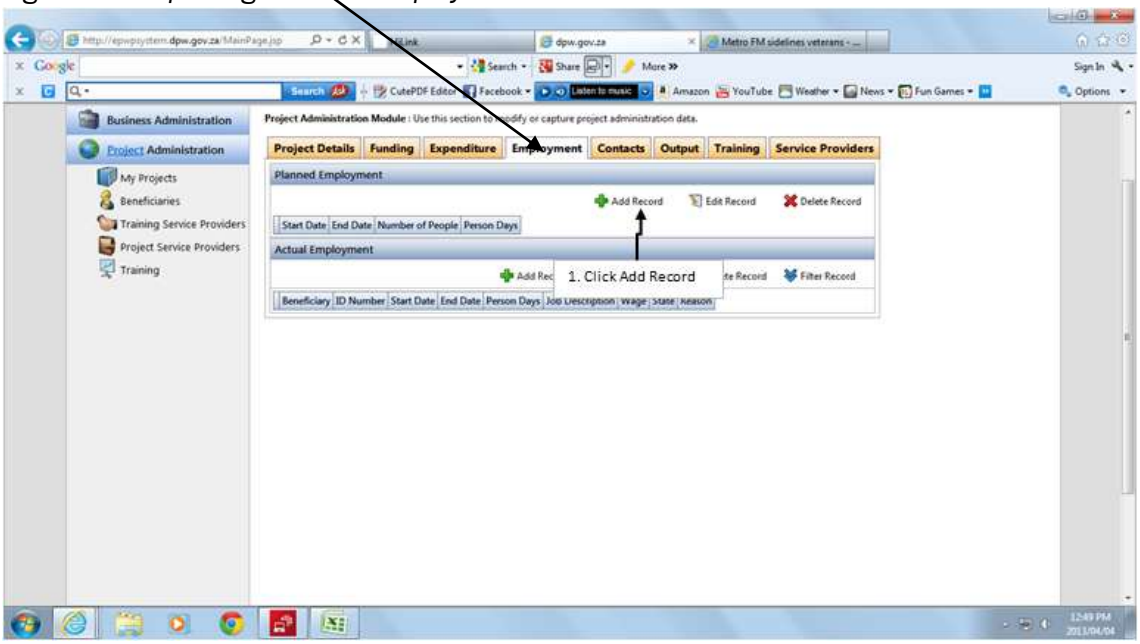
THE CAPTURING PROCESS

Please note that actual employment data of beneficiaries can be captured by means of the 'manual' process or the bulk upload process. *Note that Beneficiaries' ID number is compulsory in the IRS. The system allows ID number to be updated in the database if it was incorrectly or wrongly captured. It should further be noted that correct ID numbers are encouraged to contribute to the work opportunities (WOs) created. The use of child labour in EPWP is prohibited therefore Beneficiaries participating should not be below 16 years of age.* When employment data of beneficiaries is captured by means of the 'manual' process, those beneficiaries have to be already available on the database of beneficiaries. On the other hand, when employment data is captured by means of the bulk uploading process, there is no such prior requirement, because during this process the beneficiaries are also being uploaded onto the system's database of beneficiaries. The important part to be noted is to update the beneficiary data especially addresses and contacts etc. in the database after successfully bulk uploaded.

6.4.5.1 Planned Employment

For planned employment, we shall focus on data for the 2013/14 EPWP reporting period, even though the project started on 1 January 2013. In other words, only the 8 040 person days are relevant during the current EPWP reporting cycle. To capture the employment tab must be active.

Figure 37: Capturing Planned Employment Data



To capture the procedure is as follows:

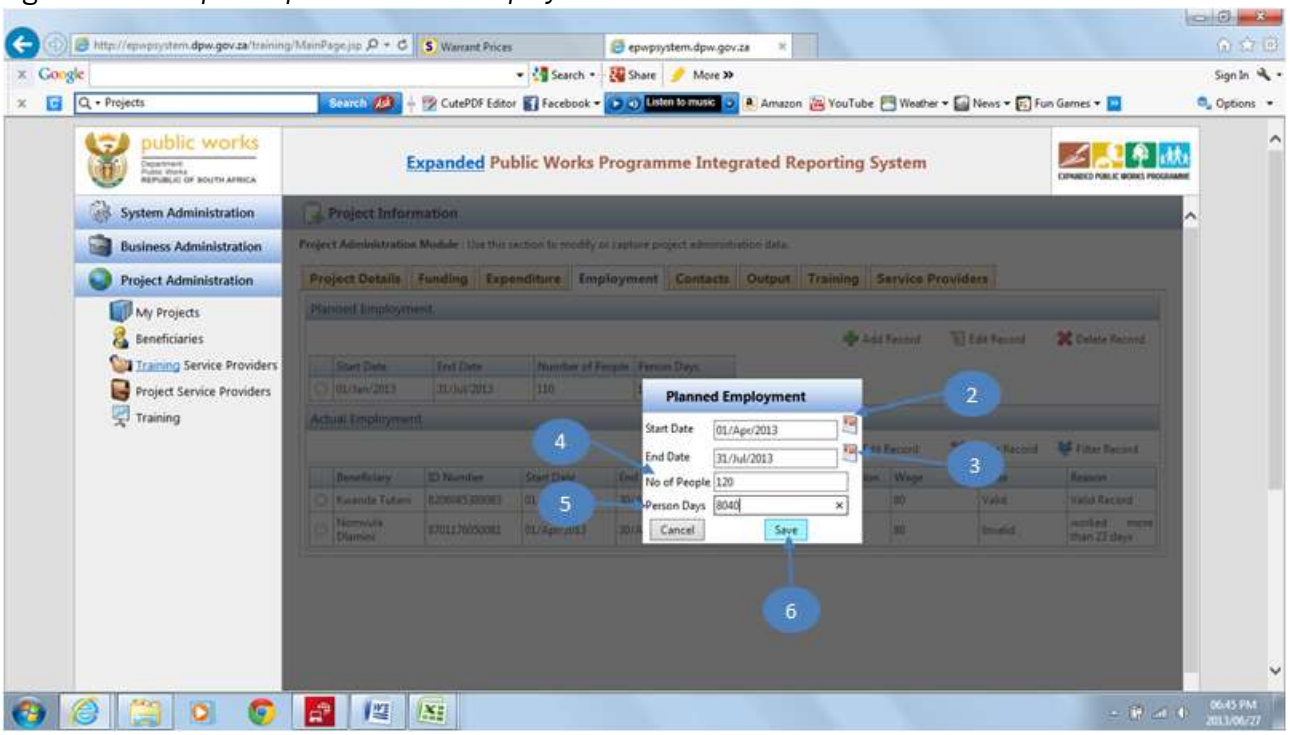
Step 1: Click Add Record *(figure 37)*, and then a pop-up window will appear *(figure 37-1)*

Then:

Step 2: Click icon calendar and select the Start Date (1 April 2013)

Step 3: Click icon calendar and select the End Date (31 July 2013)

Figure 37-1: Step to capture Planned Employment Data



Step 4: Enter Number of People to be employed as the project's beneficiaries

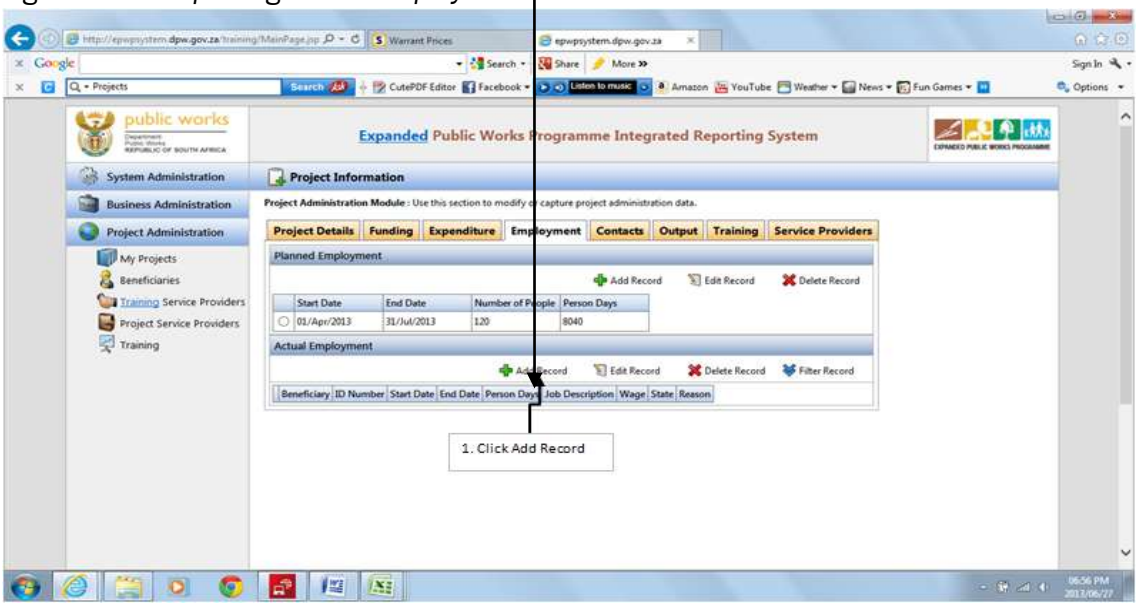
Step 5: Enter the number of person days that will result from the employment

Step 6: Click save, when finished

6.4.5.2 Actual Employment - the 'manual' process

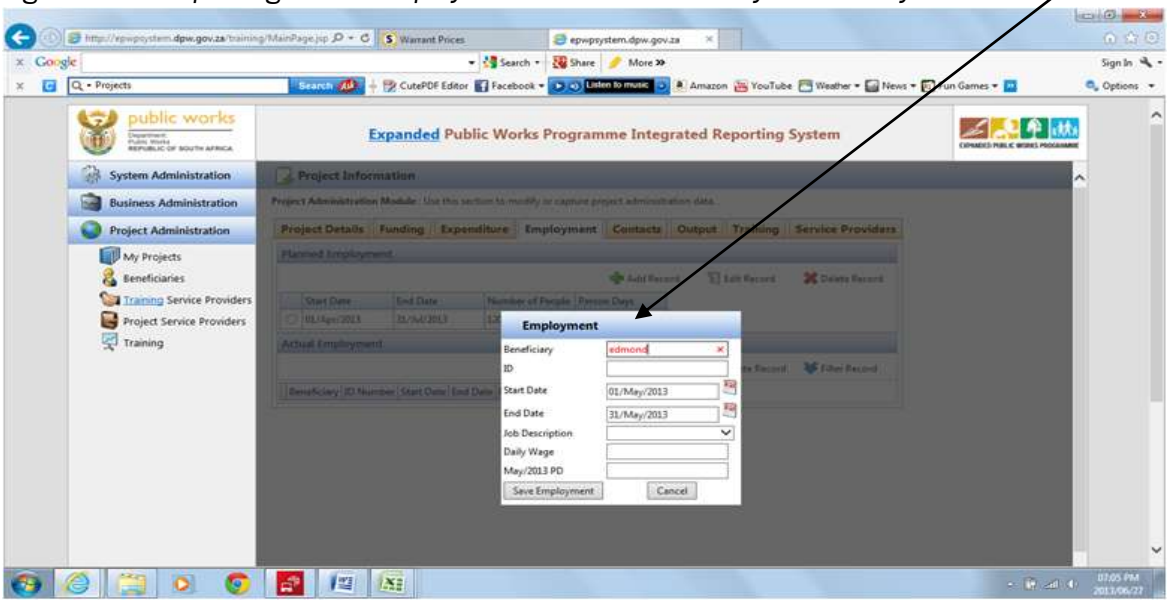
When you capture actual employment data of a beneficiary by means of the 'manual' process, make sure that such a beneficiary or beneficiaries already exist in the beneficiaries' database. To undertake the process, start with step 1 by clicking Add Record, under Actual Employment.

Figure 37-2: Capturing Actual Employment Data



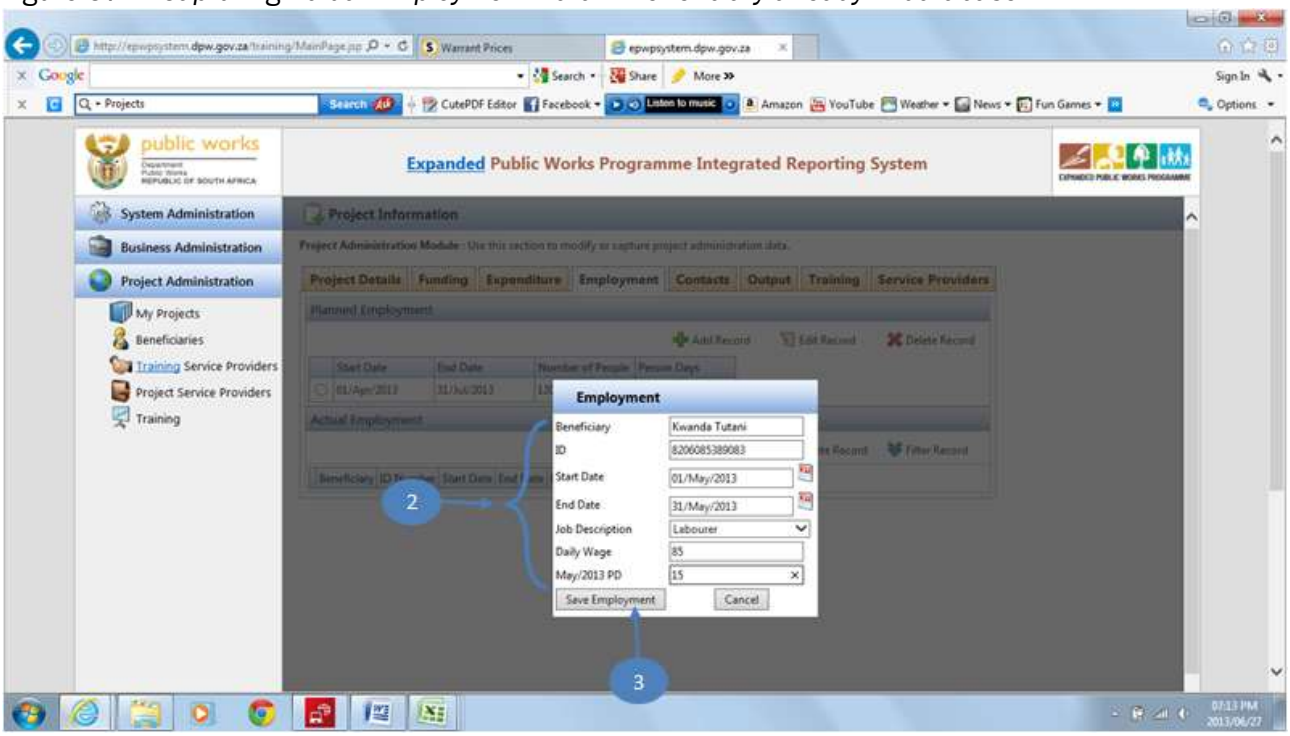
Thereafter, a pop-up window will appear where you will capture employment details of one beneficiary at a time. If the beneficiary does not already exist in the database of beneficiaries, **it will appear in a red font.**

Figure 37-3: Capturing Actual Employment Data – Beneficiary not already in database



If a beneficiary already exists in the database, once you type in the name then the system will list all the names related to your beneficiary then you will have to select the correct name. Once the correct name is entered in the beneficiary field, the system will automatically populate the ID number field.

Figure 37-4: Capturing Actual Employment Data – Beneficiary already in database



At this stage (June 2013), we are capturing employment data of beneficiaries that worked in the past month – May 2013.

Step 2: Enter name of beneficiary, and the system will populate ID number if the beneficiary is already in the database.

Ensure that the start and end date are correct:

Start date: 1 May 2013

End date: 31 May 2013

These dates have to fall within the start and end dates of planned employment.

Select Job description from dropdown – Labourer

Enter the daily wage rate of beneficiary – R85 per day

Enter person days worked by the beneficiary in May 2013 – 15 days

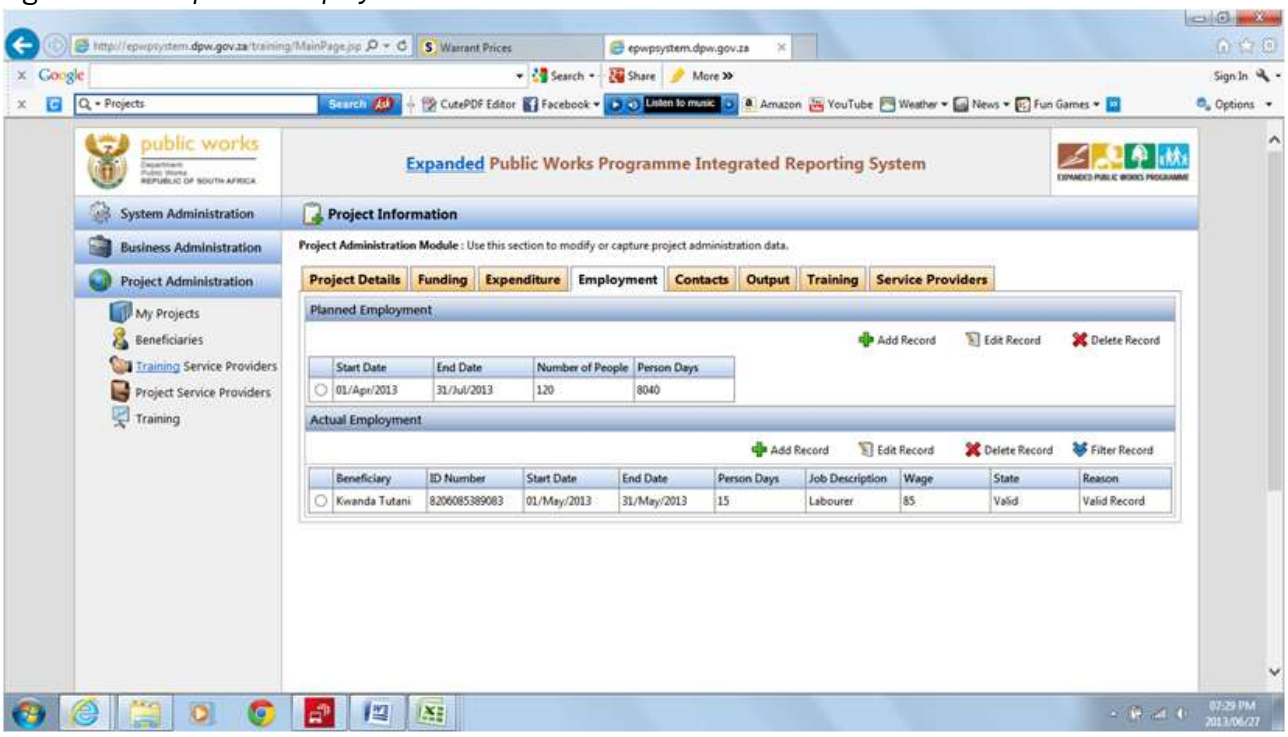
Step 3: Click Save Employment, when finished

IRS Compatibility

If your Actual Employment screen is not reflected as in Figure 37-4, it means that your capturing equipment (computer/laptop) is not compatible with the IRS which requires Internet explorer version 8 or above. Therefore it will be appreciated to request your IT to update your capturing equipment accordingly.

Once complete, this is how the captured information will appear.

Figure 37-5: Captured Employment Data



Important to be noted:

If bulk upload process will be used the following should be noted:

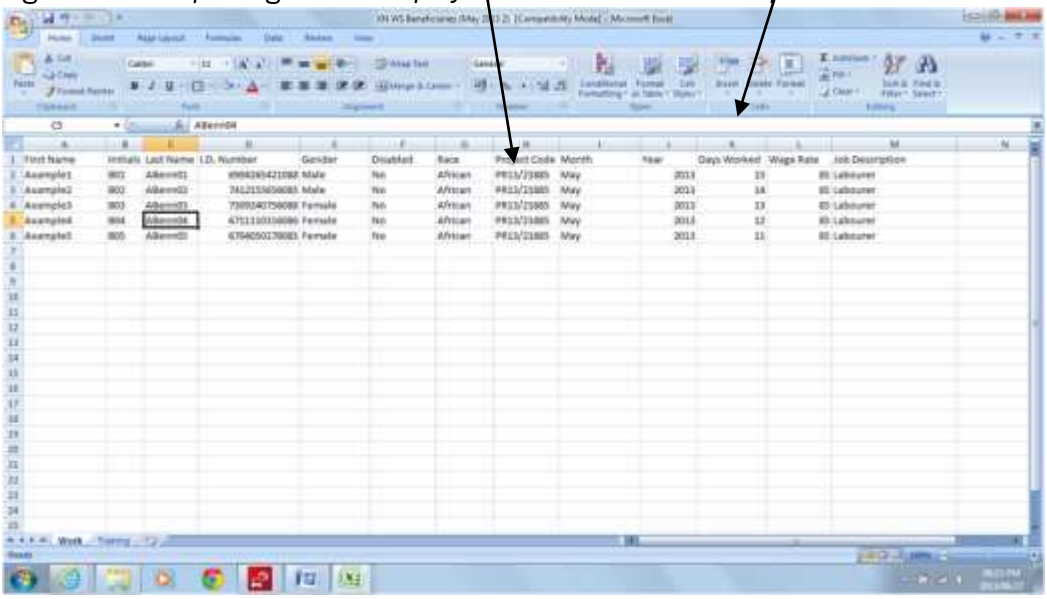
- Only the template from the system must be used for bulk uploading
- The template should not be tampered with such as drawing lines etc.
- Do not type data where there are drop downs but select from drop downs prior copy & paste
- Save the template as reflected in Figure 37-6

6.4.5.3 Actual Employment - the bulk upload process

When you capture actual employment data of beneficiaries by means of the bulk upload process, beneficiaries do not have to already exist in the beneficiaries' database. They are simultaneously uploaded onto the database during the bulk upload process, which is as follows:

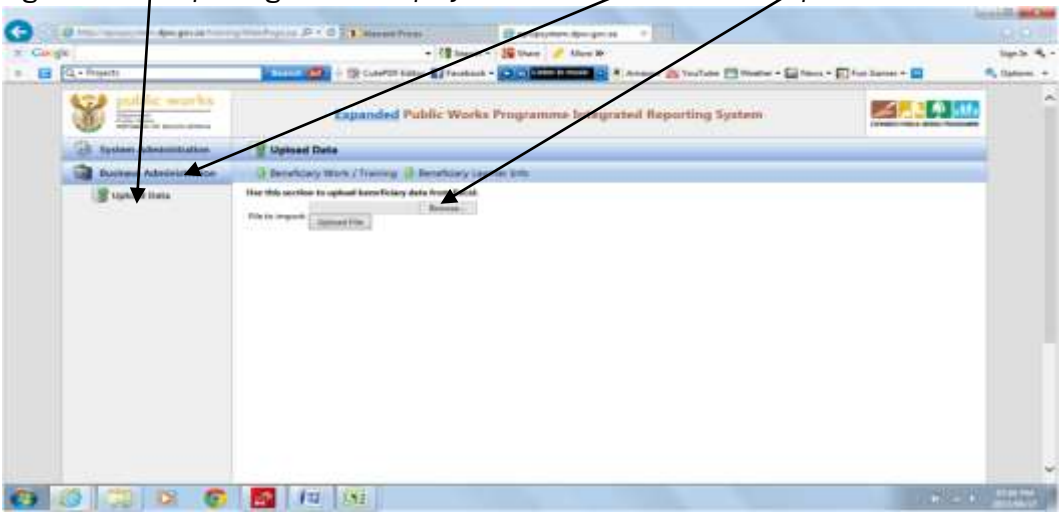
Step 1: Ensure that the relevant beneficiaries **have been captured on the bulk upload Excel template**. Make sure that the correct **Project Code** is included. Where there are **dropdowns** select data from the dropdowns. Use **Work sheet** for beneficiaries who worked and **Training sheet** for beneficiaries who received training. In the case where Beneficiaries **only** received training such as Learnerships etc. capture them on Work sheet first but allocate them **zero (0) days worked** and correct training days received.

Figure 37-6: Capturing Actual Employment – Excel File to be uploaded



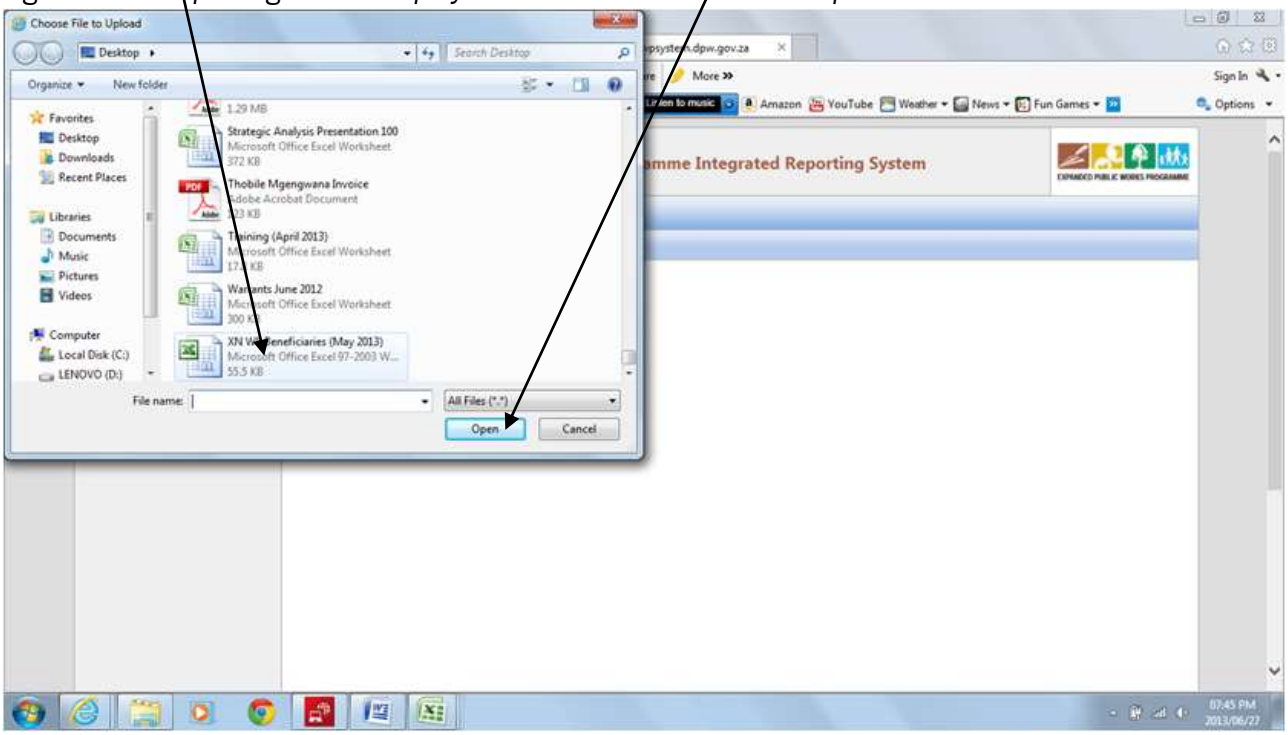
Step 2: Save this spreadsheet as Excel 97-2003 Workbook. Go to the Business Administration section, **click Upload Data** and then fetch the spreadsheet where it is saved by **clicking browse**.

Figure 37-7: Capturing Actual Employment – Browse for File to Upload



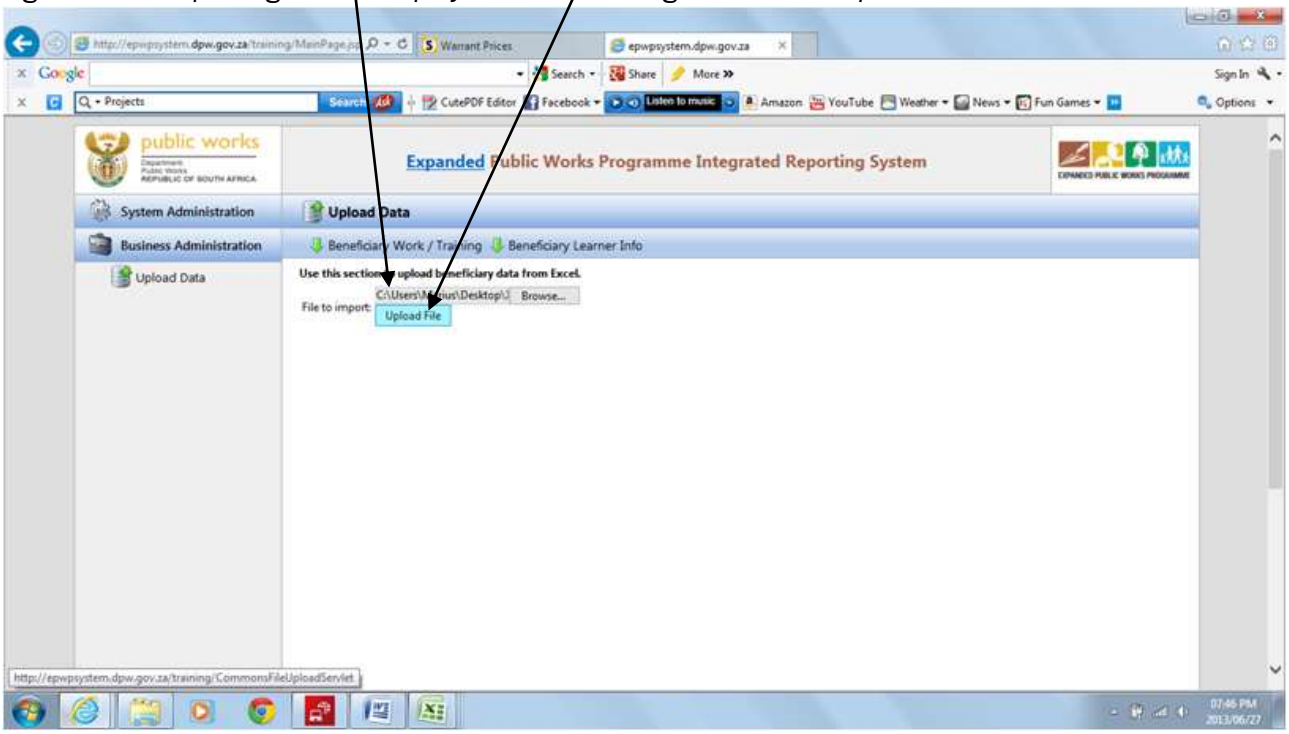
Step 3: **Choose** the file to upload by selecting and then **click Open or Double click** on the file.

Figure 37-8: Capturing Actual Employment – Choose File for Bulk Upload



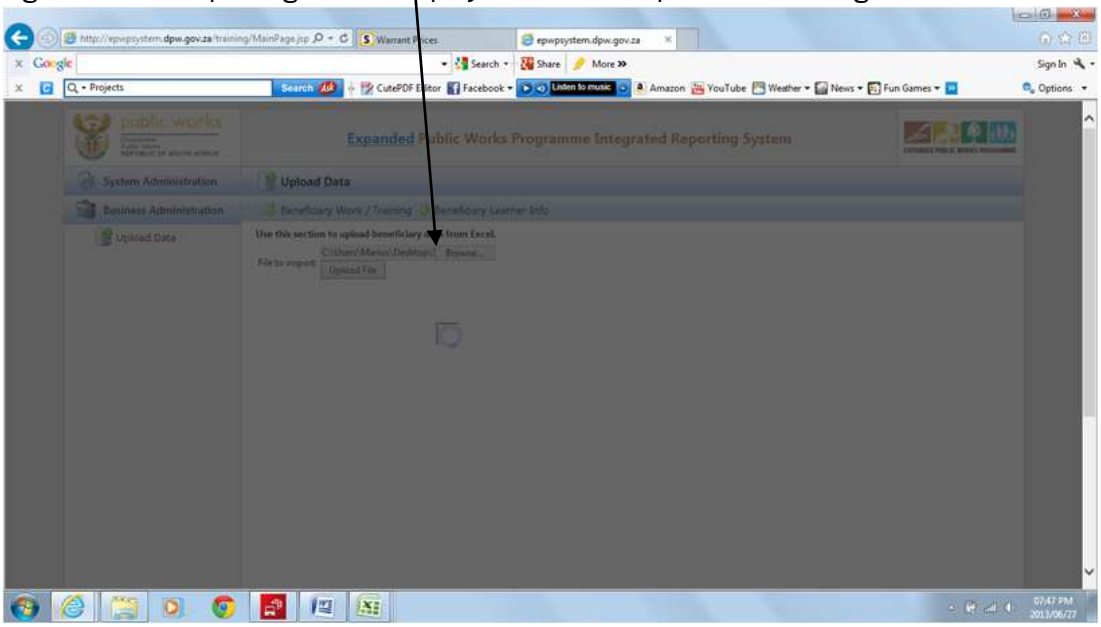
Step 4: Once the file is **attached**, then **click upload file** and the system will process the upload.

Figure 37-9: Capturing Actual Employment – Attaching File for Bulk Upload



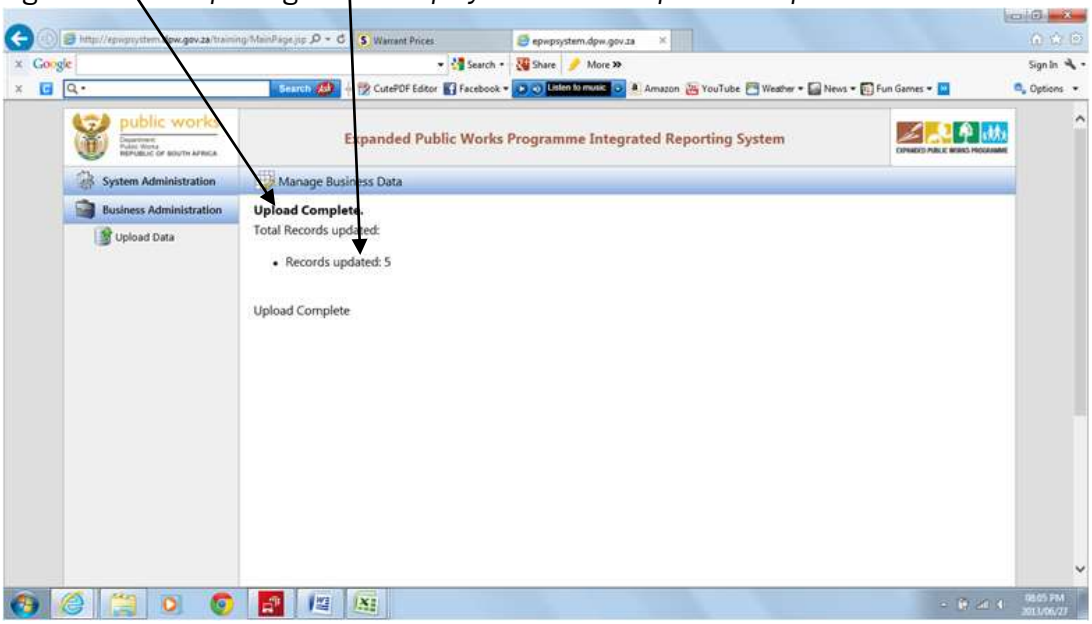
As the system uploads the actual employment data of the beneficiaries who worked during the month of May 2013, the screen will turn dark, as shown below.

Figure 37-10: Capturing Actual Employment – Bulk Upload Processing



Once the process has successfully completed, the system will provide a message that **'Upload Complete' and specify (5) Records updated**.

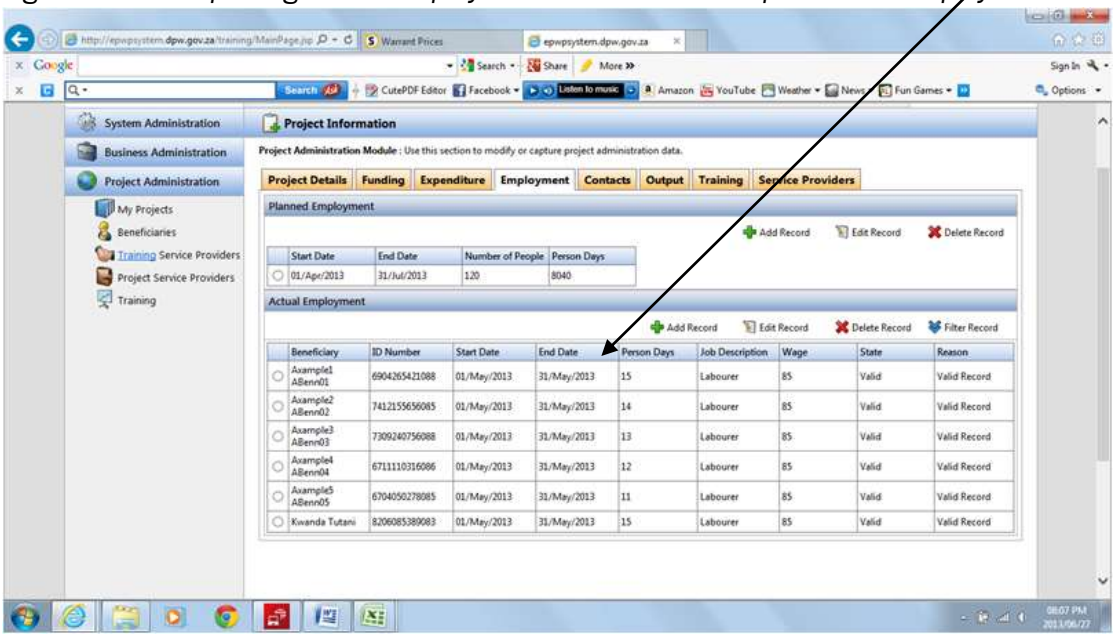
Figure 37-11: Capturing Actual Employment – Bulk Upload Complete



If the bulk upload process was not successfully completed, the message will be 'Upload Complete' and the system will not indicate how many beneficiaries records were updated.

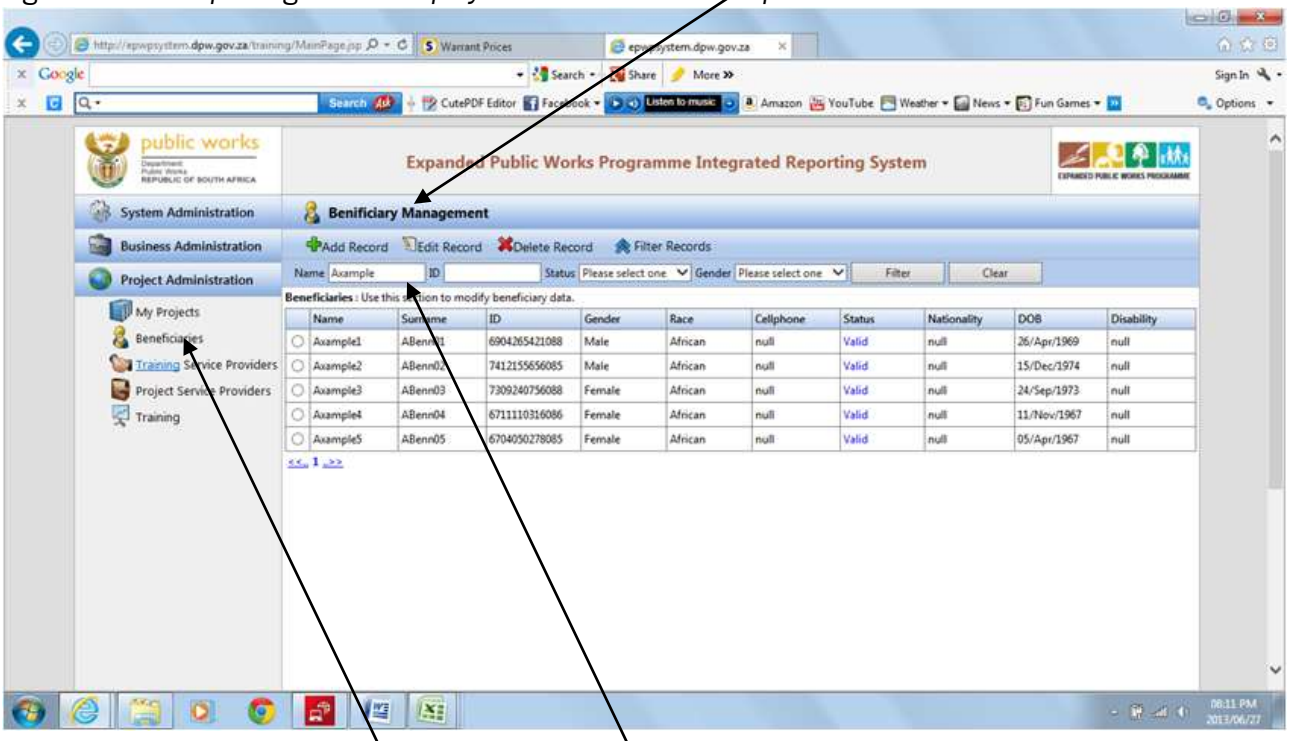
To confirm a successful upload process, go to the Employment section. Our **five (5) beneficiaries** have been included under actual employment, along with the first beneficiary that we uploaded 'manually'.

Figure 37-12: Capturing Actual Employment – Beneficiaries uploaded in Employment



During this process the 5 beneficiaries have been included in the **beneficiaries' database** as well.

Figure 37-13: Capturing Actual Employment – Beneficiaries uploaded in beneficiaries' database



To confirm this, click on **beneficiaries** and then **filter according to the names of the beneficiaries. Remember to update beneficiary data** such as physical address, contact and relative name & contacts. **NB: PLEASE SEE THE BUSINESS ADMINISTRATION SECTION TO BETTER UNDERSTAND HOW THE BULK UPLOAD PROCESS WORKS.**

6.4.5.4 *Project Contacts*

The person to be entered as a contact should be an official not a contractor such as project manager of the project that is being captured. It should be a person with a knowledge and insight about the project and not the data capturer, unless is the same person.

Figure 38: Components of EPWP IR System

Make sure that you are under the Contact tabs.

To capture a contact, step 1 is to Add Record.

Figure 39: Capturing Project Contacts

Figure 39-1: Capturing Project Contacts

Step 2: Enter the Name, Work Address, Work Telephone, Cell Phone and Email – has been entered.

Step 3: Click Save Contact, when finished.

6. 4. 5.5 PROJECT OUTPUT

Introduction

The project output section is divided into two parts – for planning purposes, under **Planned Output** and for capturing deliverables that were actually achieved in a particular period, under **Actual Output**.

Planned Output

Column A of *table 9* shows that there are 18 kilometres (km) of pipelines that would be installed in this project between 1 January and 31 July 2013.

CONTEXT

The upgrade of the water supply between the Ntenetyana Dam and Mount Frere town would install 18km of pipelines between 1 January 2013 and 31 July 2013.

The output data has to be obtained from the approved project business plan.

Table 9: Alignment of project data with the EPWP reporting period

PROJECT PLANNED OUTPUT DATA	COLUMN A	COLUMN B	COLUMN C
Calendar OR FY Year	2013	2012/13	2013/14
	Project	Project	Project
TOTAL OUTPUT (km)	18	9	9
	Planned	Planned	Planned
January	3	3	-
February	3	3	-
March	3	3	-
April	3	-	3
May	3	-	3
June	2	-	2
July	1	-	1
August	-	-	-
September	-	-	-
October	-	-	-
November	-	-	-
December	-	-	-

2012/13 EPWP REPORTING CYCLE = 9

2013/14 EPWP REPORTING CYCLE = 9

Column B includes the actual output for the 2012/13 Treasury reporting period, while column C shows the output for the 2013/14 Treasury reporting period.

Capturing Planned Output

The planned output is for the entire project duration that means envisage end product after the project is completed. The XN WS Water Supply project: 18 km pipelines to be installed. To capture Planned Output, click Add Record *(figure 40)* and this will be followed by a pop-up window *(figure 40-1)*.

Figure 40: Capturing Planned Output – Add Record

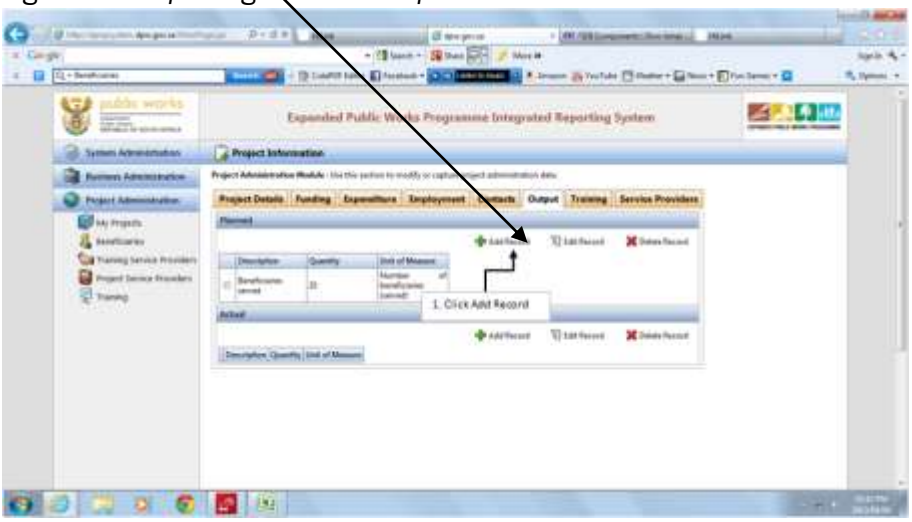
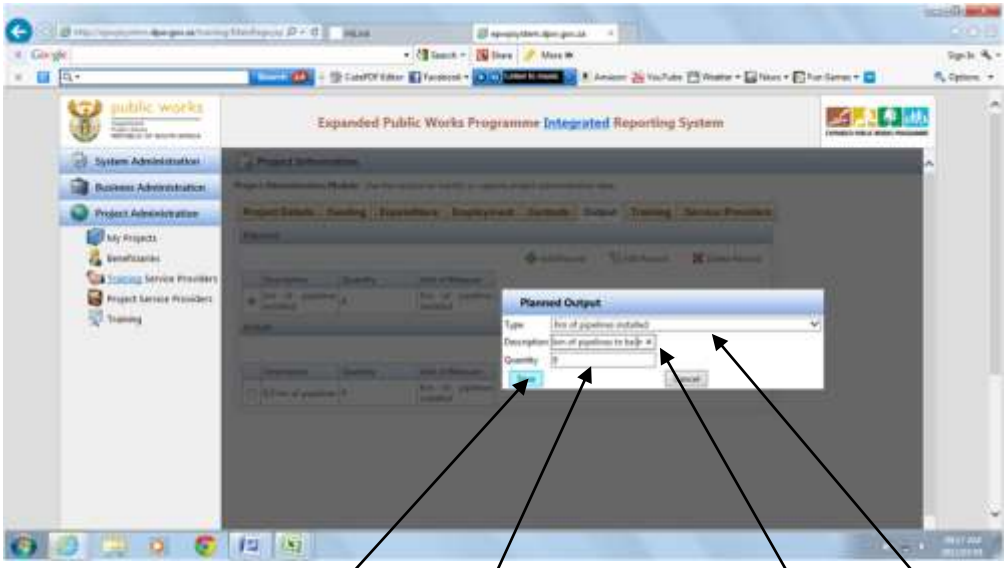


Figure 40-1: Capturing Planned Output – Enter Data



Select the type of project expected output from the dropdown box: **km(unit of measure) of pipelines installed**

Provide a brief description of the expected output: **pipelines to be installed**

Enter quantity, which is 18 km: **18**

Click Save, when finished.

Actual Output

Column A of table 31 shows that there were 15 kilometres (km) of pipelines that were installed between 1 January and 31 May 2013.

CONTEXT

During the upgrade of the water supply between the Ntenetyana Dam and Mount Frere town there were 15km of pipelines that were installed between 1 January 2013 and 31 May 2013 – 9km between January and the end of March 2013, and 6km between April and end of June 2013.

The output data has to be aligned with the cycles of EPWP reporting. The data for January to March 2013 falls under the 2012/13 EPWP reporting period, while that between April and July 2013 falls under the 2013/14 EPWP reporting period.

Table 10: Alignment of project data with the EPWP reporting period

PROJECT ACTUAL OUTPUT DATA	COLUMN A	COLUMN B	COLUMN C
Calendar OR FY Year	2013	2012/13	2013/14
	Project	Project	Project
TOTAL OUTPUT (km)	15	9	6
	Planned	Planned	Planned
January	3	3	-
February	3	3	-
March	3	3	-
April	3	-	3
May	3	-	3
June	-	-	-
July	-	-	-
August	-	-	-
September	-	-	-
October	-	-	-
November	-	-	-
December	-	-	-

2012/13 EPWP REPORTING CYCLE = 9

2013/14 EPWP REPORTING CYCLE = 6

Column B of *table 10* includes the actual output for the 2012/13 EPWP reporting period (9km of pipelines installed from January to the end of March), while column C shows the output for the 2013/14 EPWP reporting period (6km of pipelines installed from April to the end of May 2013).

NB: If the project have more than one project output such as upgrading of water supply infrastructure over an 18km distance and paving 10km road. The planned is captured once and actual should be updated on a monthly basis separately as follows including community benefitting:

Planned

	Description	Quantity	Unit of Measure
○	km of water supply upgraded	18	Km of storm water drains constructed to standard
○	Paving	10	Paving

Actual

	Description	Quantity	Unit of Measure
○	km of water supply upgraded	10	Km of storm water drains constructed to standard
○	Paving	5	Paving

Capturing Actual Output

In capturing actual output for the XN WS Water Supply project, we shall ignore the 2012/13 period and focus on the 2013/14 EPWP reporting period – there were 6km of water supply pipelines installed by the end of May 2013. To capture Actual Output, click Add Record *(figure 40-2)* and this will be followed by a pop-up window *(figure 40-2)*.

Figure 40-2: Capturing Actual Output – Add Record

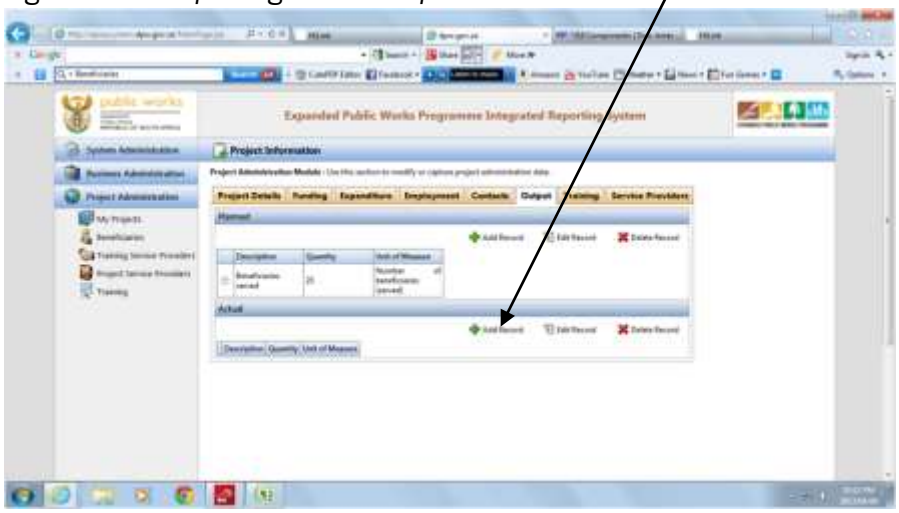
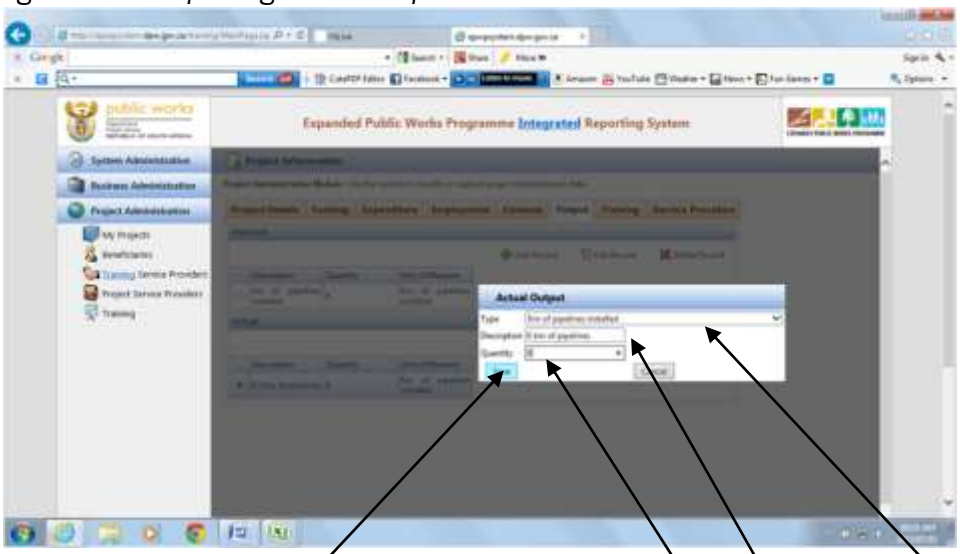


Figure 40-3: Capturing Actual Output – Enter Data



Select the type of output expected from the project from the dropdown box: **km of pipelines installed**

Provide a brief description of the expected output: **6km of pipelines were installed**

Enter quantity, which is 6 km for the 2013/14 EPWP reporting period: **6**

Click Save, when finished.

NB: If 8.5km of pipelines were installed, enter that in the description filled and enter 9 in quantity, to round-off.

6.4.5.6 *PROJECT TRAINING*

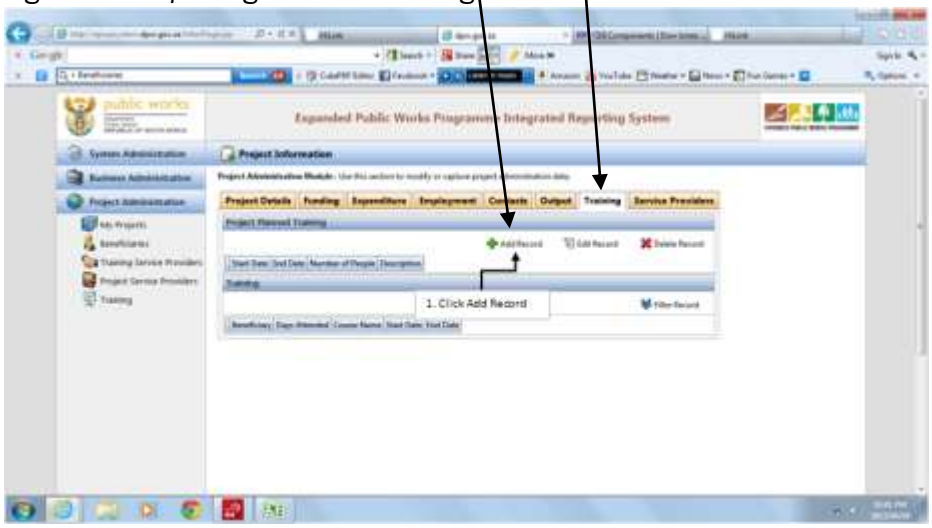
This section shows how to capture and manage information for **Planned Training** and **Actual Training** of a project. When you click on the **Training tab** the system take you the training screen in *figure 42*.

Figure 41: Components of EPWP IR System

Planned Training

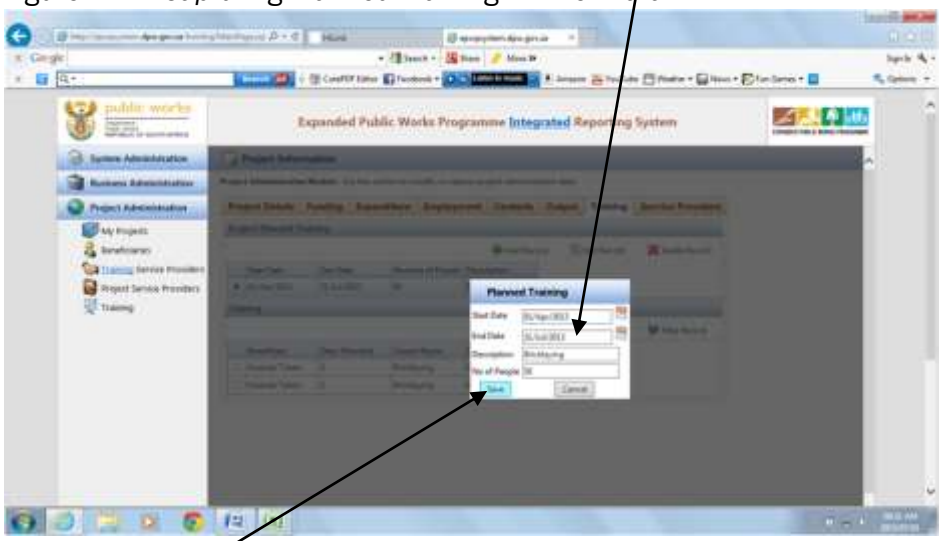
To capture planned Training click Add Record, as shown on *figure 42*.

Figure 42: Capturing Planned Training – Add Record



Thereafter, a window will pop-up *(figure 42-1)* – (i) capture the **Start and End dates** of the planned training, (ii) the **description** of the training and (iii) the **number of beneficiaries** expected to attend.

Figure 42-1: Capturing Planned Training – Enter Data

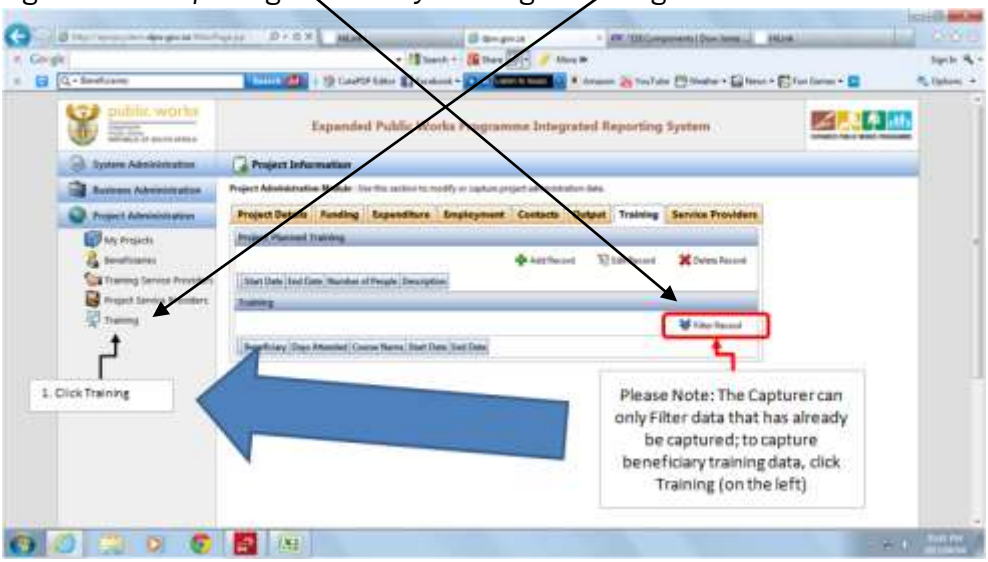


Click Save, when finished.

Actual Training

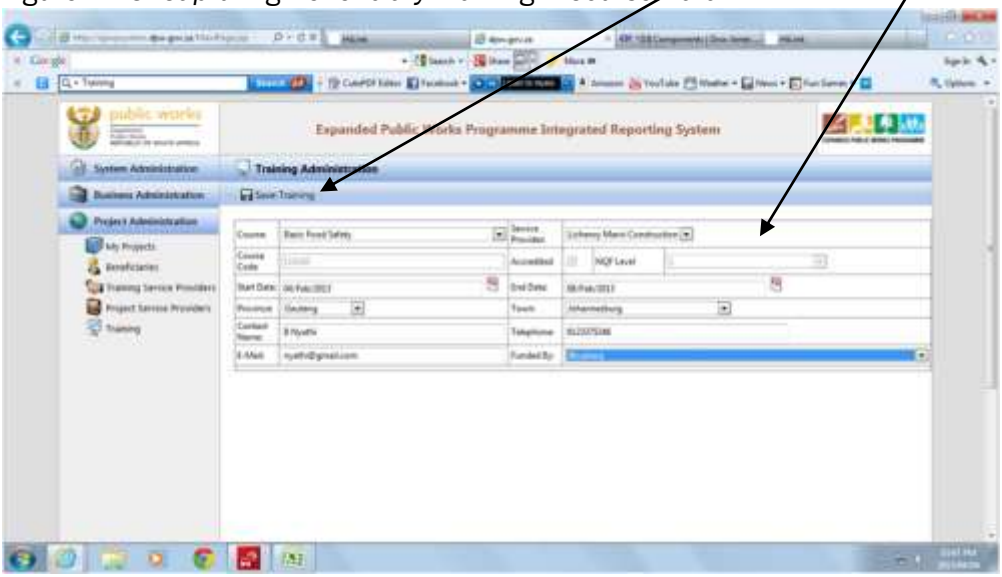
This part allows for the capturing of training that has already taken place. In this part, the system allows you to **filter only** and so to capture actual training data **click training on the left-hand side** to begin the process.

Figure 42-2: Capturing Beneficiary Training – Training Administration


Expanded Public Works Programme Integrated Reporting System
1. Click Training
Please Note: The Capturer can only Filter data that has already be captured; to capture beneficiary training data, click Training (on the left)

The system will open the Training Administration section. Enter the **details of the specific course** that the beneficiaries attended in the previous month of the current quarter – for the XN WS Water Supply project this is the bricklaying course for the month of May 2013. **Click save** when course details have been captured.

Figure 42-3: Capturing Beneficiary Training – Course Data



See course details required for capturing, below.

COURSE DETAILS REQUIRED BY THE SYSTEM

Select relevant Course from dropdown list – e.g. **Bricklaying**

(NB: The system will populate Course Code (**2356**); indicate accreditation (**√ - YES**) as well as the NQF level (**3**). These fields will appear in grey)

Select Start (**8 April 2013**) and End date (**12 May 2013**),

Select the Province (**Eastern Cape**) and town (**Mount Frere**) where it took place from dropdown list,

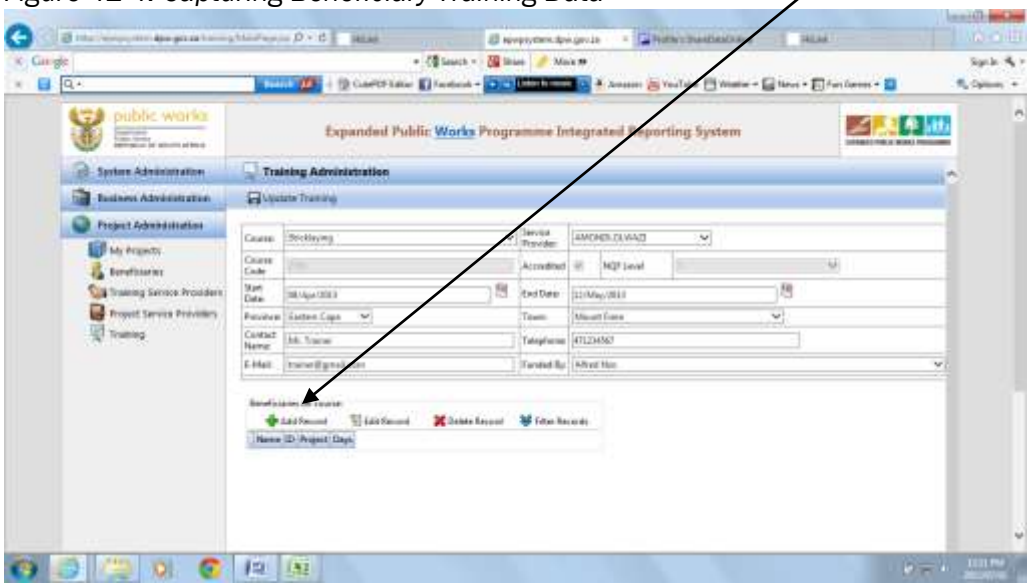
Enter the name of the contact person (**Mr Trainer**) of the training course, his/her telephone number (0471234567) and e-mail address (**trainer@gmail.com**).

Select the name the institution that funded it from dropdown list – for example the name of the Municipality (**Alfred Nzo**)

Click Save when finished. The system will show a message that the training details have been saved successfully.

Once successfully saved, the system will open a **new section (beneficiaries on course)** to capture beneficiaries who attended the relevant training course, see below.

Figure 42-4: Capturing Beneficiary Training Data



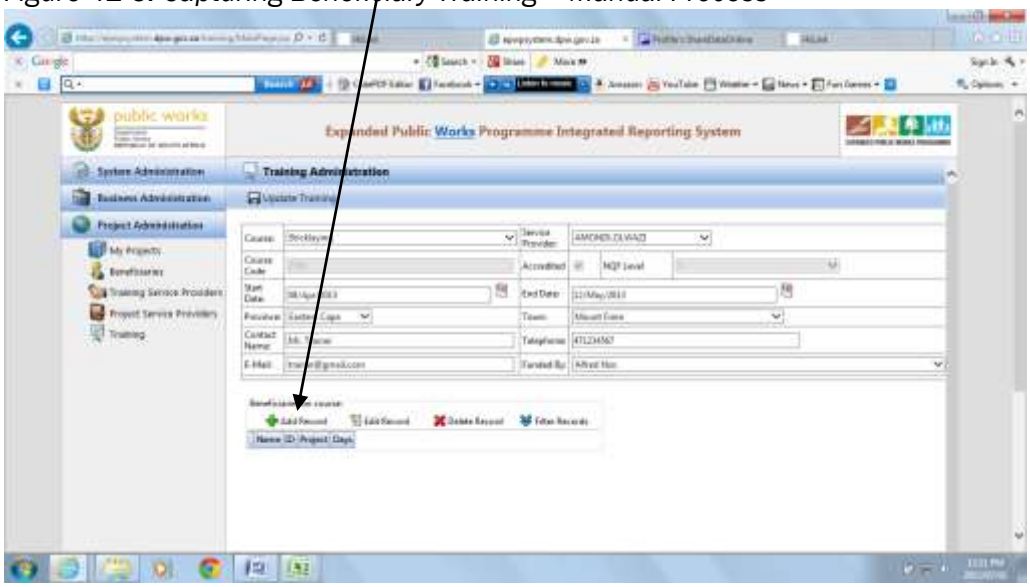
This section allows you to capture data of one beneficiary at a time – this is the 'manual' approach of capturing training data of beneficiaries. Please note that if the name of the beneficiary does not exist in the beneficiary database, you will not be able to capture their training data.

The second approach of capturing training data of beneficiaries is by means of the bulk upload process. The bulk upload approach allows you to capture training data of many beneficiaries simultaneously. This process does not require beneficiaries to have been pre-loaded on the beneficiary database. It achieves a dual purpose, (i) uploading profile data of beneficiaries onto the beneficiaries' database and (ii) uploading training data of beneficiaries into training administration, at the same time.

CAPTURING BENEFICIARY TRAINING DATA – MANUAL PROCESS

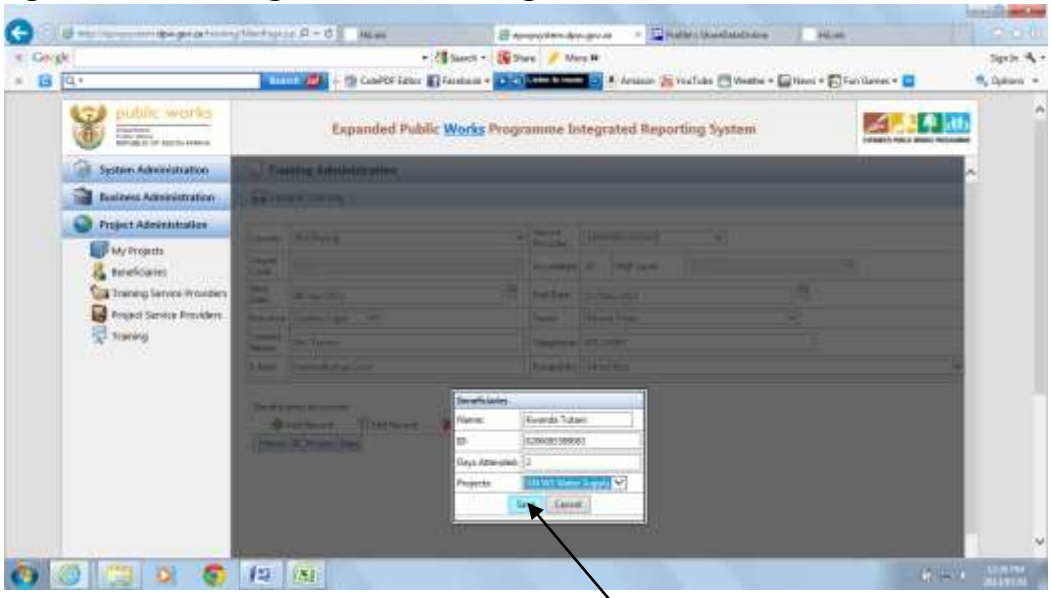
To start the process, click on Add Record.

Figure 42-5: Capturing Beneficiary Training – Manual Process



In the pop-up window, enter the details of each beneficiary that attended the training course.

Figure 42-6: Capturing Beneficiary Training – Enter Data



Enter the name of the beneficiary (**Kwanda Tutani**) and the system will populate ID number – if the name of a beneficiary that does not already exist on the beneficiaries' database, it will appear in a red font.

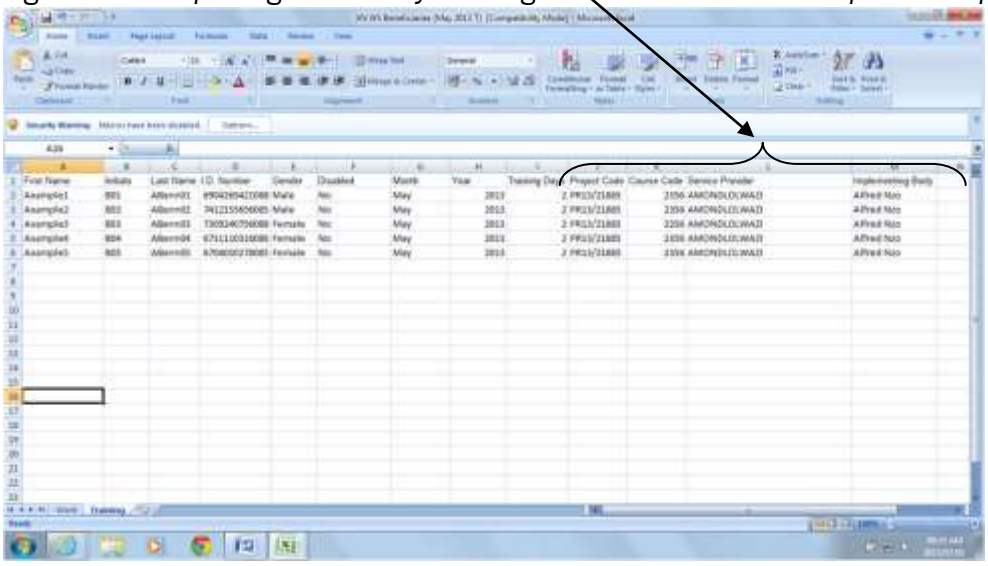
Enter the number days of attendance, which is **2 days** and then link this training course to the project that you are capturing for, which is **XN WS Water Supply**; Click Save, when finished.

CAPTURING BENEFICIARY TRAINING DATA – BULK UPLOAD PROCESS

When you capture actual training data of beneficiaries by means of the bulk upload process, beneficiaries do not have to be pre-loaded on the beneficiaries' database. Beneficiary profiles are simultaneously uploaded onto the database through this process. To undertake this process do the following:

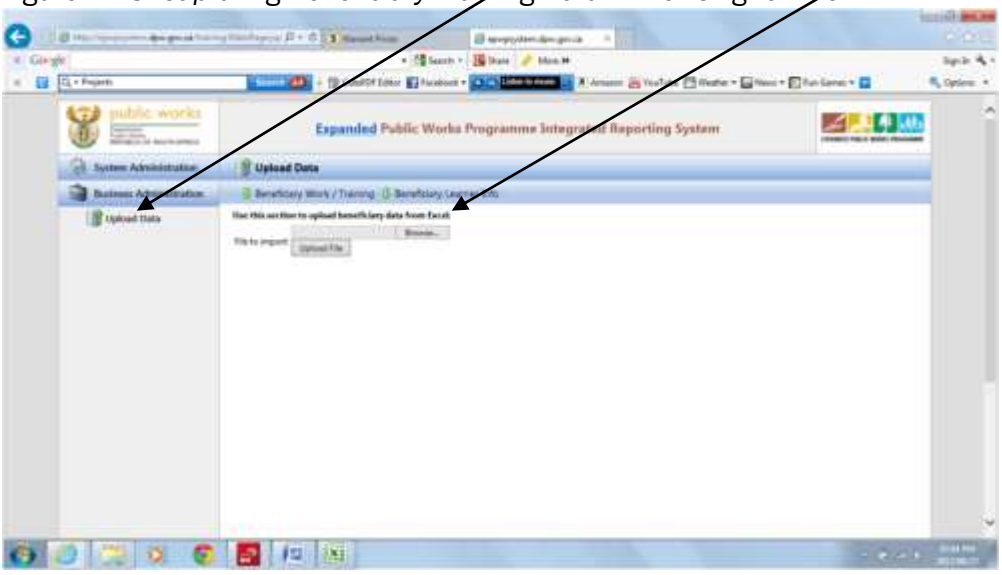
Step 1: Ensure that the relevant beneficiaries **have been captured on the bulk upload Excel template**. Make sure that the correct **Project Code, Course Code, Service Provider and Implement Body** have been included.

Figure 42-7: Capturing Beneficiary Training Data on the Excel Bulk Upload Template



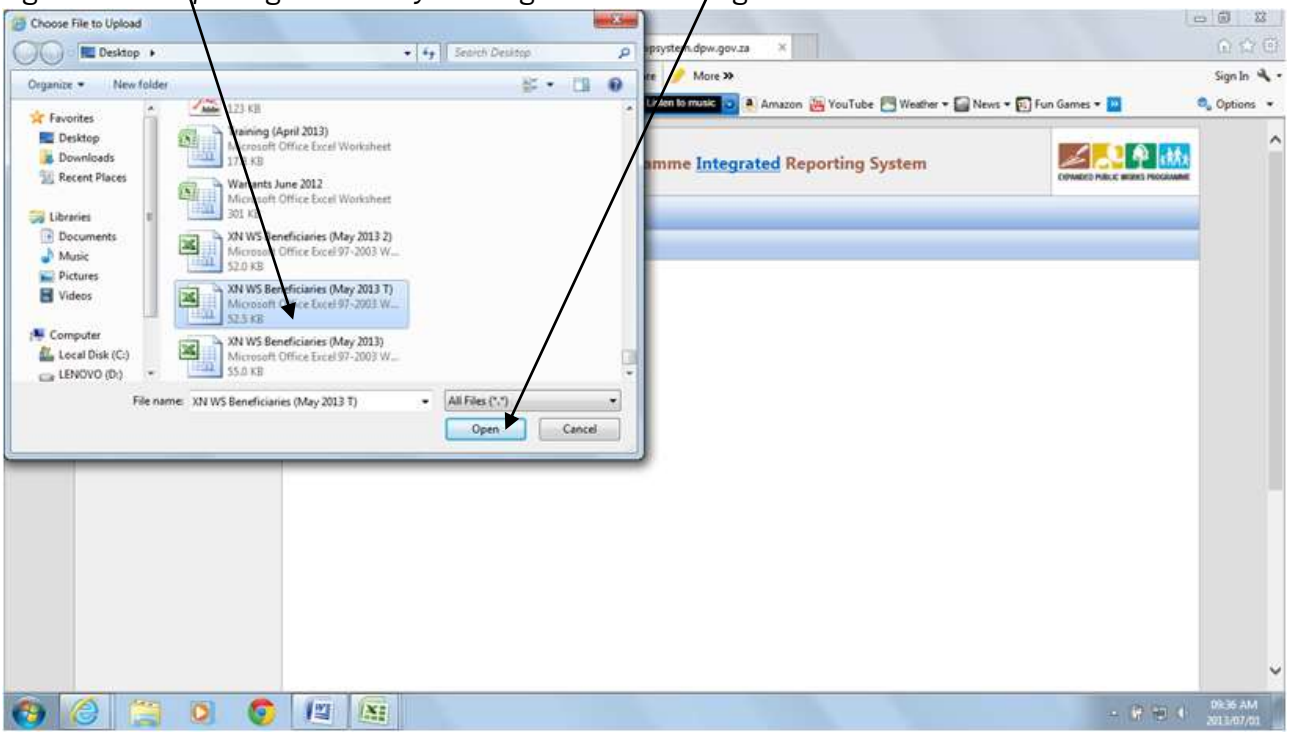
Step 2: Save this spreadsheet as an Excel 97-2003 Workbook. To upload the spreadsheet onto the system, go to the Business Administration section, **click Upload Data** and then browse for it where it is saved by **clicking browse**.

Figure 42-8: Capturing Beneficiary Training Data – Browsing for File



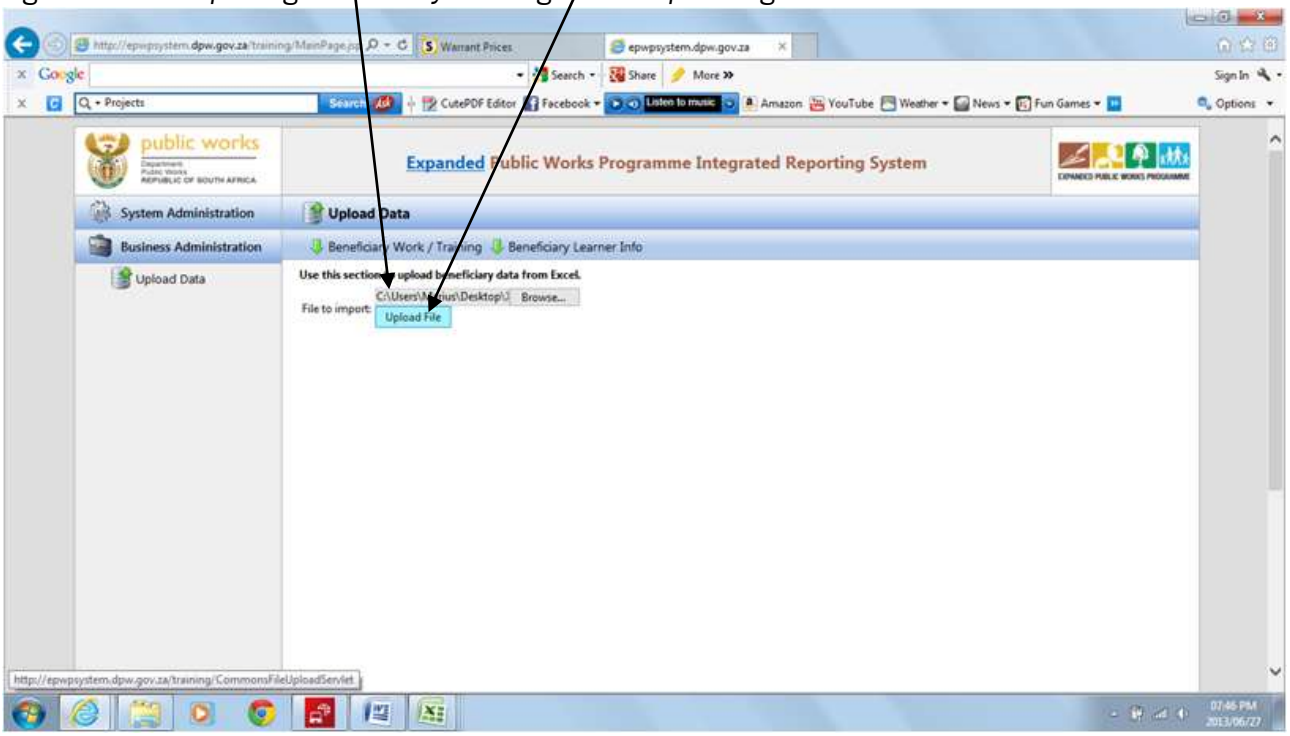
Step 3: **Choose** the file to upload by selecting and then **click Open**.

Figure 42-9: Capturing Beneficiary Training Data – Choosing File



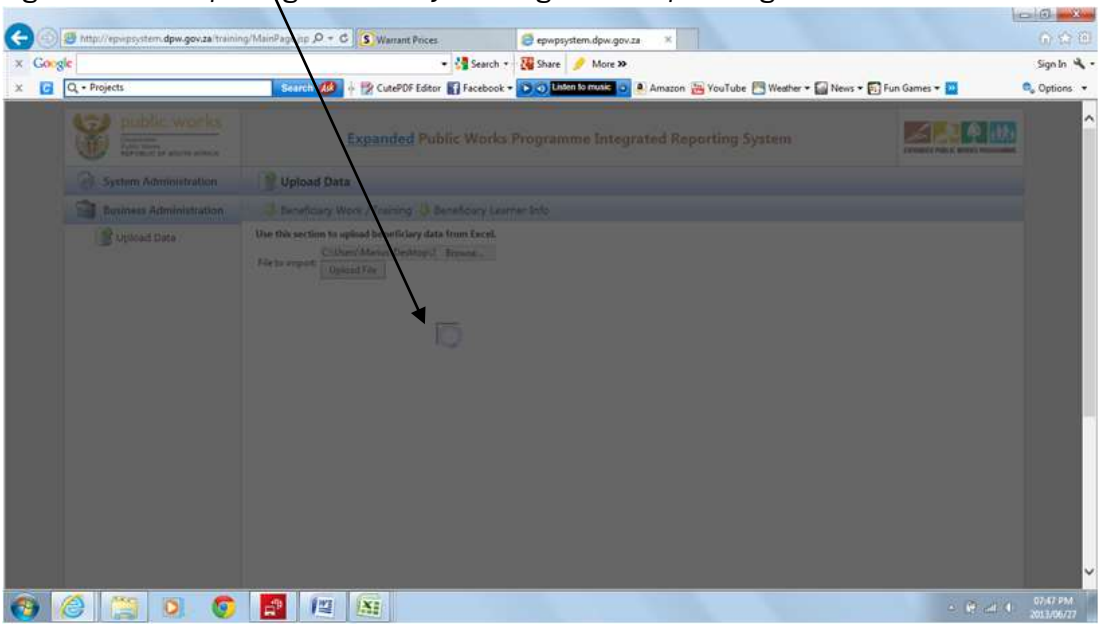
Step 4: Once the file is **attached**, then **click upload file** and the system will process the upload.

Figure 42-10: Capturing Beneficiary Training Data – Uploading File



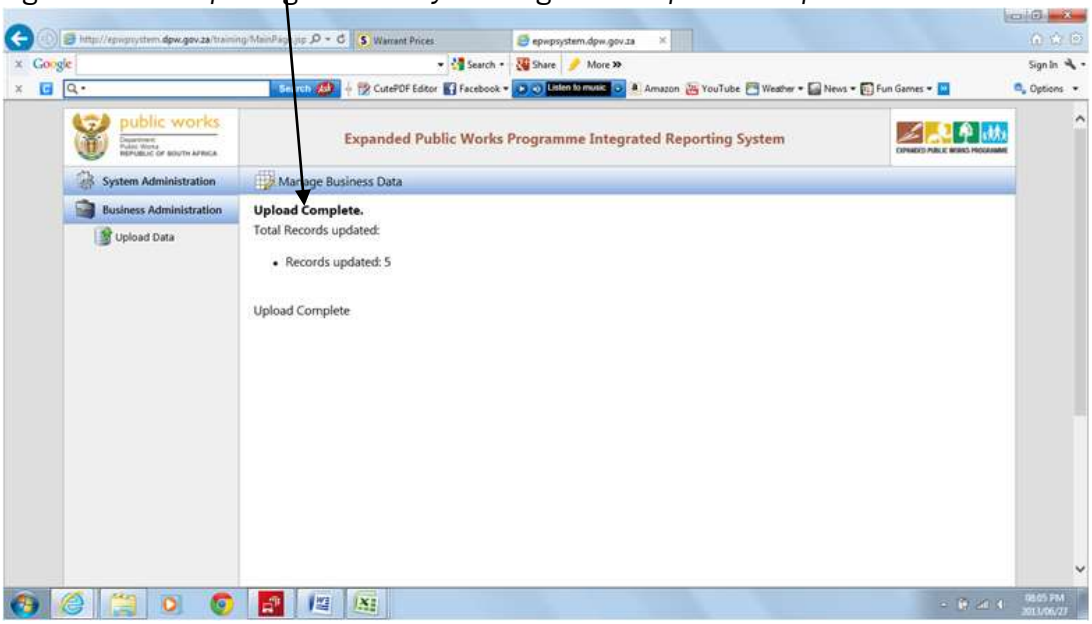
As the system uploads the actual training data of the beneficiaries for the month of May 2013, the screen will turn dark, as shown below.

Figure 42-11: Capturing Beneficiary Training Data – Uploading Excel File



Once the process has successfully completed, the system will provide a message that **'Upload Complete' and 5 Records have been updated**, for example.

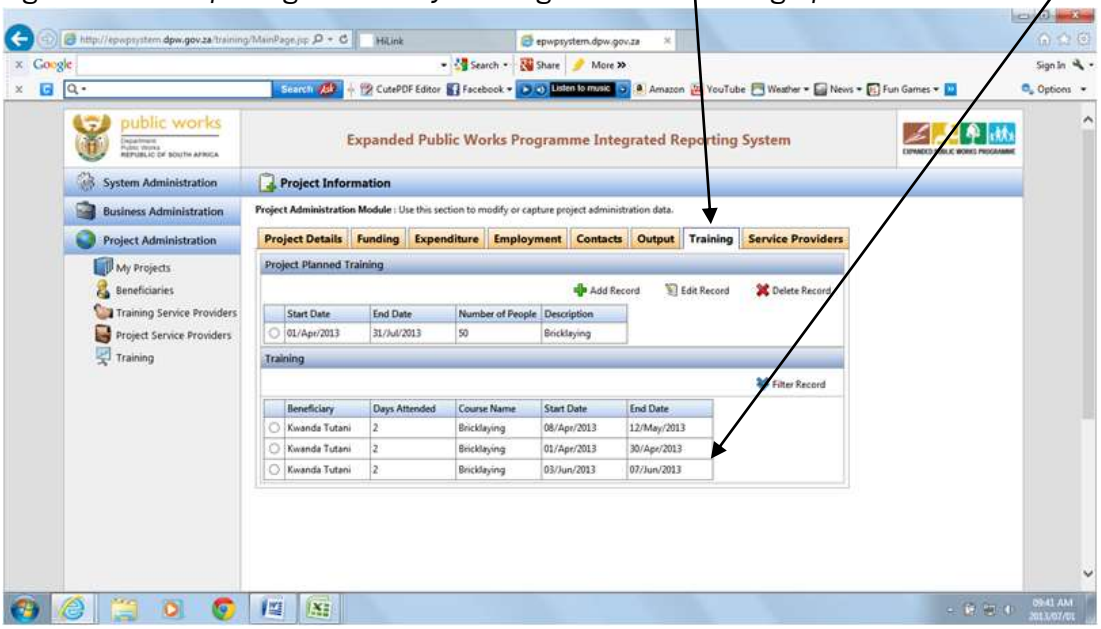
Figure 42-12: Capturing Beneficiary Training Data – Upload Complete



If the bulk upload process was not successfully completed, the message be 'Upload Complete' and the system will not indicate how many beneficiaries records were updated.

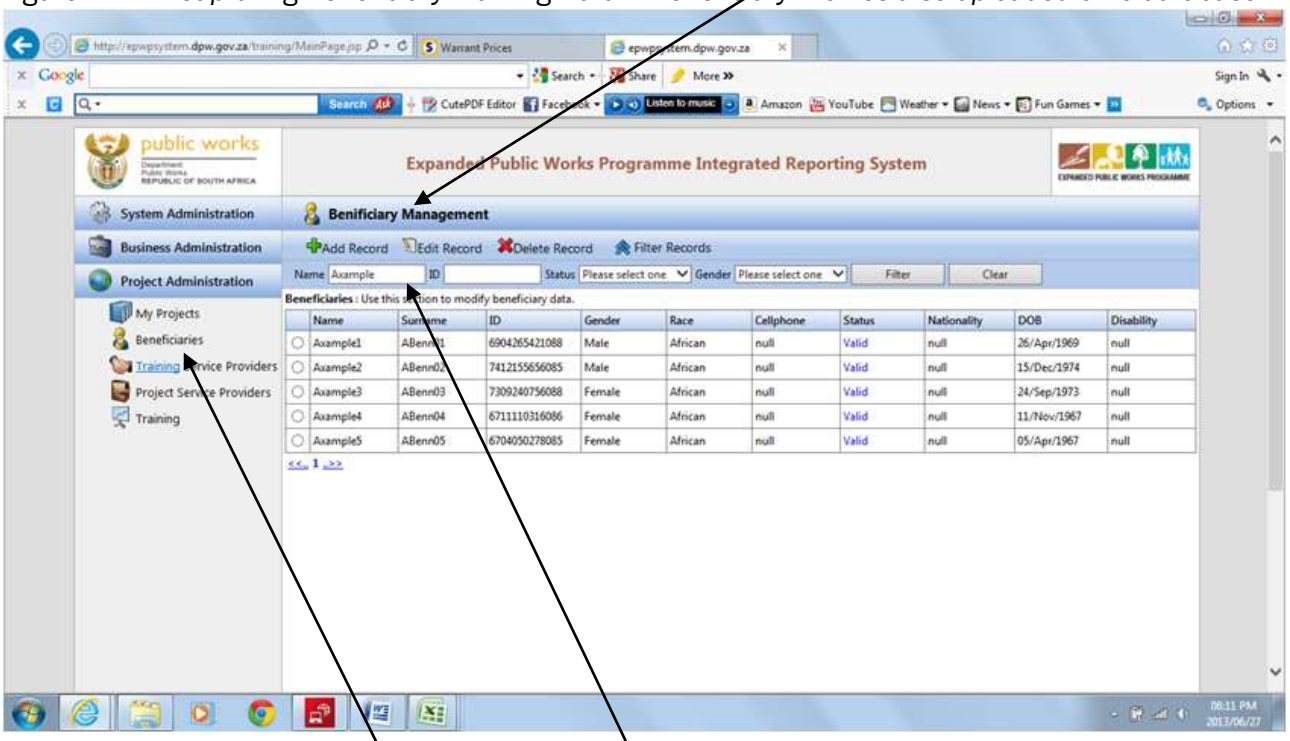
To confirm a successful upload process, go to the **Training section**. The uploaded beneficiaries will appear in this part of the training screen.

Figure 42-13: Capturing Beneficiary Training Data – Confirming Uploaded data



During this process the beneficiaries have also been uploaded onto the **beneficiaries' database**.

Figure 42-14: Capturing Beneficiary Training Data – Beneficiary Profiles also uploaded onto database



To confirm this click on **beneficiaries** and then **filter according to the names of the beneficiaries**

NB: PLEASE SEE THE BUSINESS ADMINISTRATION SECTION TO BETTER UNDERSTAND HOW THE BULK UPLOAD PROCESS WORKS.

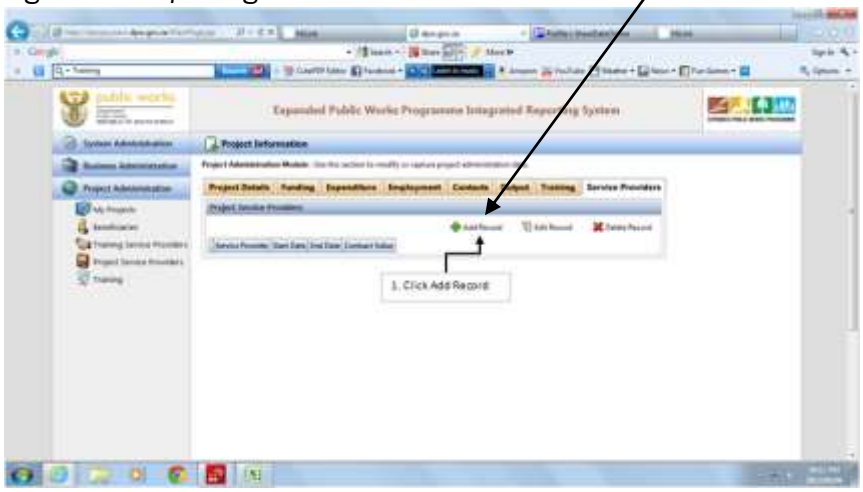
6.4.5.7 SERVICE PROVIDERS

This section demonstrates how to capture and manage data of the service providers for the project you are working on.

The data capturer has the right to Add a new service provider, Edit or Delete details of such service provider. A new service provider can be added to a project only when it profile data has already been loaded onto the database of project service providers. To add a new service provider, please click Add Record *(figure 44)*.

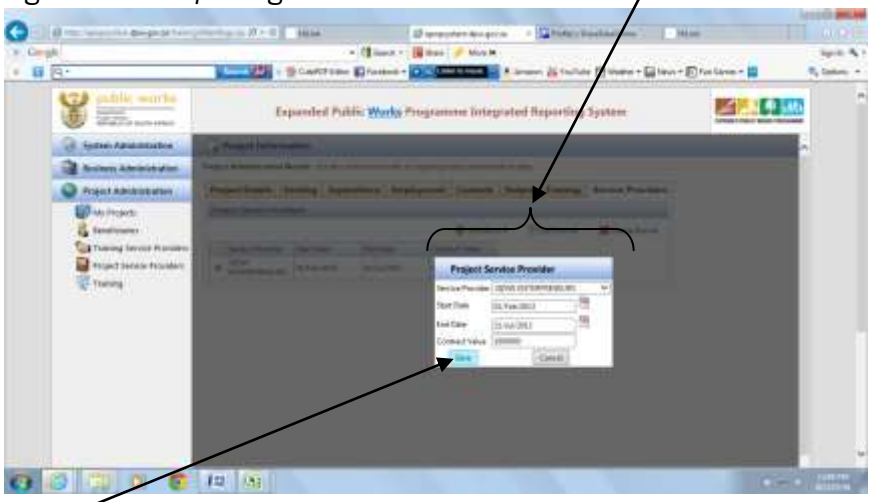
Figure 43: Components of EPWP IR System

Figure 44: Capturing Service Providers – Add Record



Once the pop-up screen comes up, (i) select the relevant name of service provider from dropdown list, (ii) the start date when the service provider began working, (iii) the end date and (iv) the value of the service provider's contract.

Figure 44-1: Capturing Service Provider – Enter Data

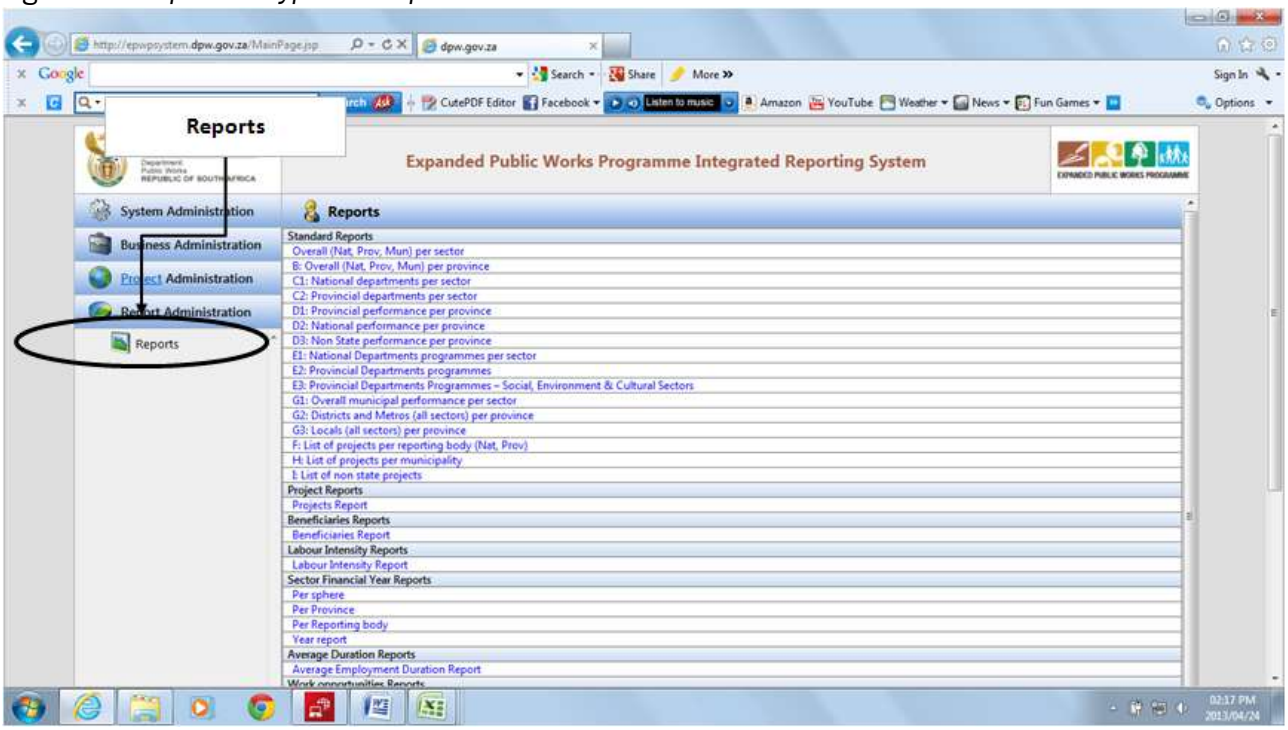


Click Save, when finished

SECTION 7: REPORT ADMINISTRATION

This section demonstrates how to generate, view and print reports of EPWP projects that have been captured onto the system.

Figure 45: Reports – Types of Reports


Reports
Expanded Public Works Programme Integrated Reporting System
System Administration
Business Administration
Project Administration
Report Administration
Reports
Reports
Standard Reports
Overall (Nat, Prov, Mun) per sector
B: Overall (Nat, Prov, Mun) per province
C1: National departments per sector
C2: Provincial departments per sector
D1: Provincial performance per province
D2: National performance per province
D3: Non State performance per province
E1: National Departments programmes per sector
E2: Provincial Departments programmes
E3: Provincial Departments Programmes – Social, Environment & Cultural Sectors
G1: Overall municipal performance per sector
G2: Districts and Metros (all sectors) per province
G3: Locals (all sectors) per province
F: List of projects per reporting body (Nat, Prov)
H: List of projects per municipality
I: List of non state projects
Project Reports
Projects Report
Beneficiaries Reports
Beneficiaries Report
Labour Intensity Reports
Labour Intensity Report
Sector Financial Year Reports
Per sphere
Per Province
Per Reporting body
Year report
Average Duration Reports
Average Employment Duration Report

The various types of Reports, these include:

Standard Reports
Project Reports
Beneficiary Reports
Labour Intensity Reports
Sector Financial Year Reports
Average Duration Reports
Work Opportunities Reports

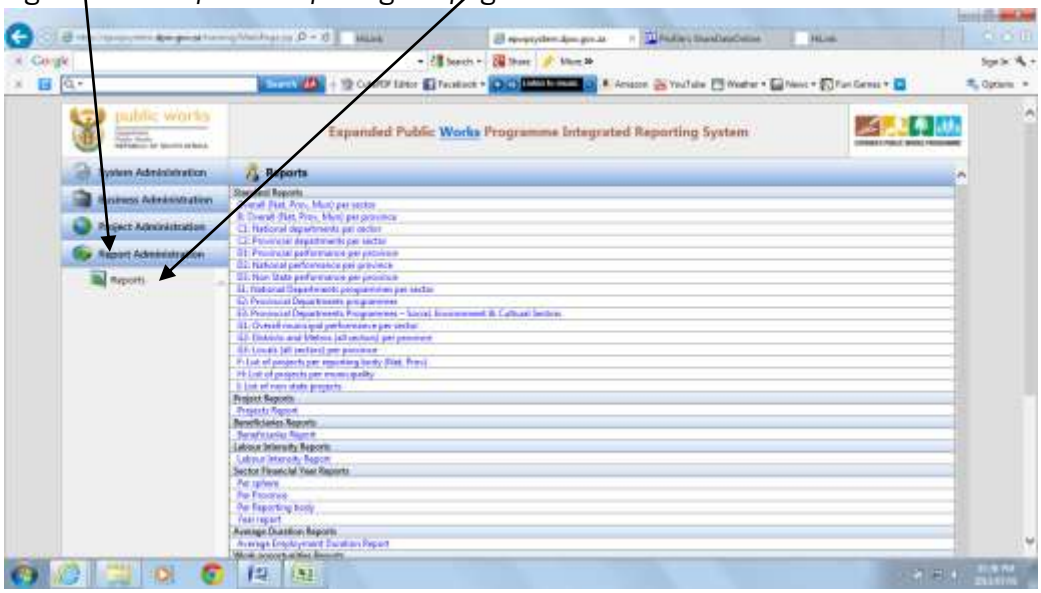
In the sections that follow we illustrate the process of generating reports by means of an example. Please note that Data Capturers, Viewers and Authorisers are all able to generate, view and print reports.

7.1 Drawing Reports

7.1.1 PROJECT REPORTS

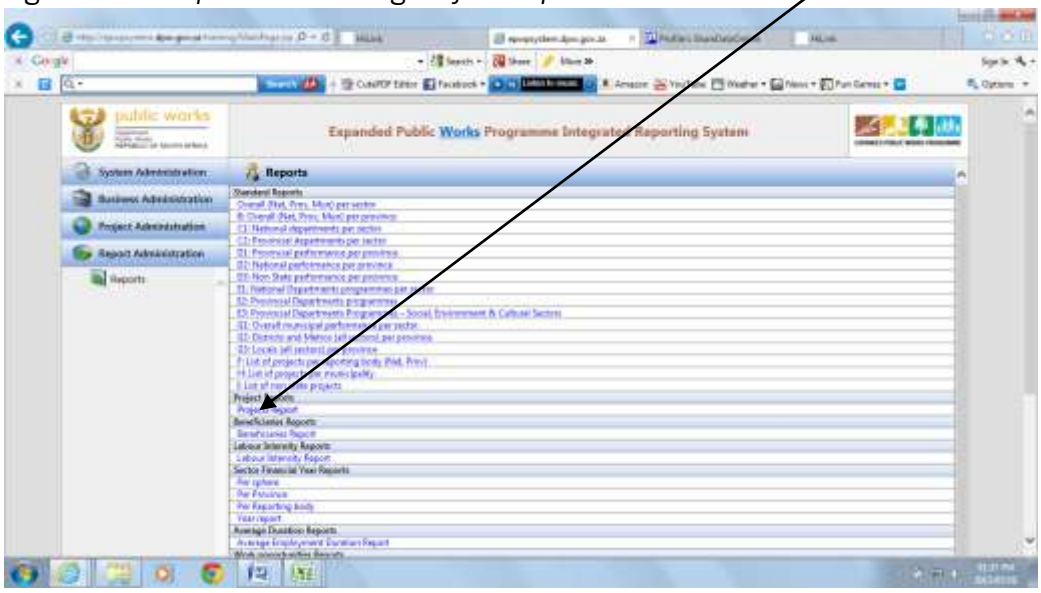
In this section, by means of an example, we illustrate how to generate a report. Let us assume that you are a viewer, in the Cacadu District of the Eastern Cape, who is interested in what was happening in the Environment and Cultural Sector over the 12-month period ending 31 May 2013. Start by clicking on Report Administration and then click on Reports and the system would open this page.

Figure 45-1: Reports – Opening the page



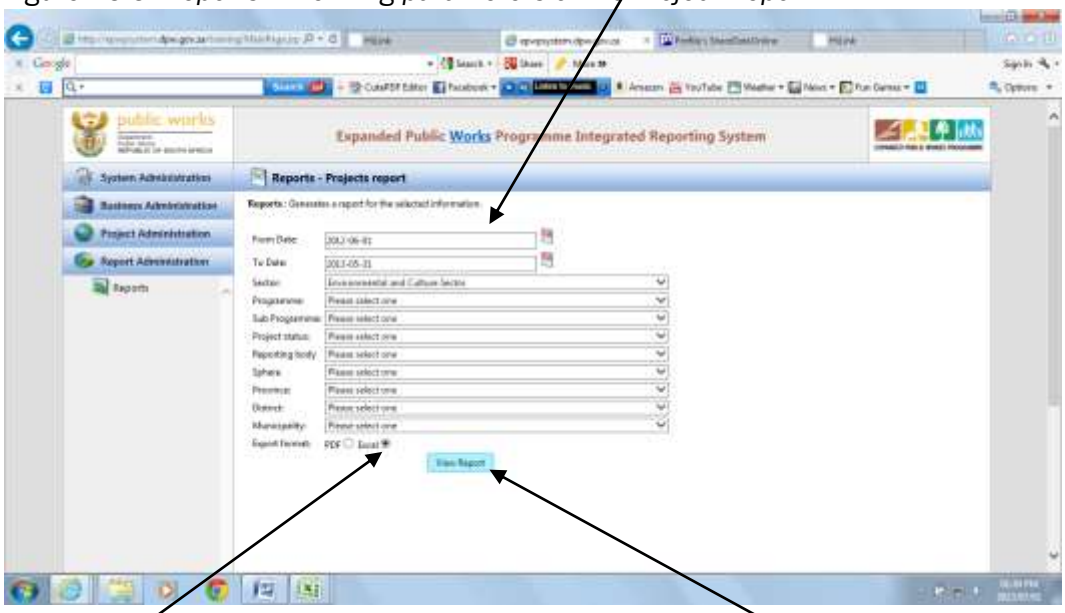
Since you are interested in the Environment & Culture projects, click Project Reports sub-heading.

Figure 45-2: Reports – Selecting Project Reports



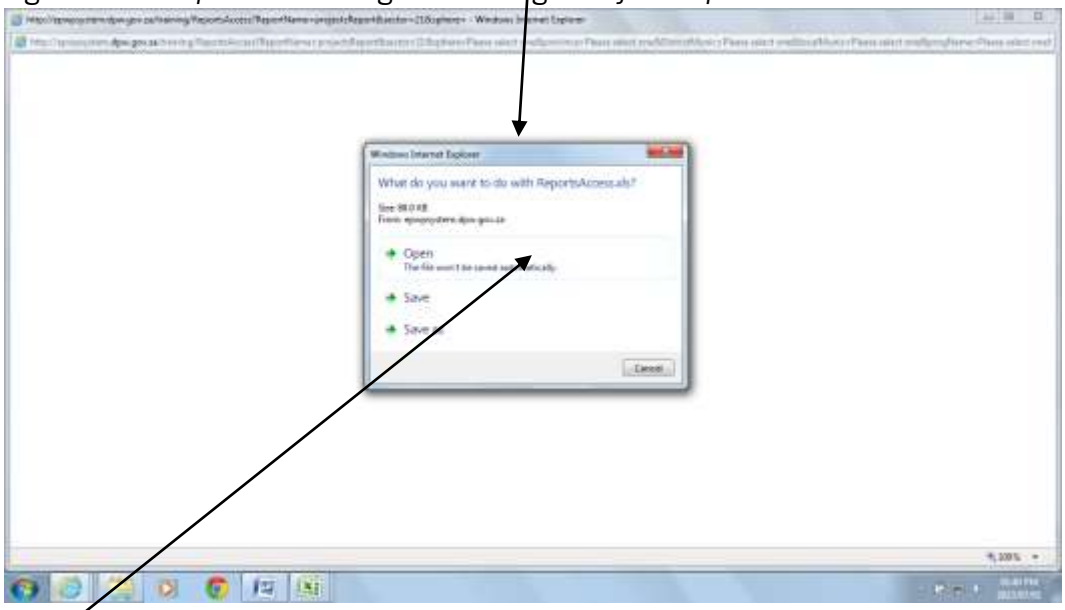
The system will open the Project reports page. Thereafter select the relevant start date, which is 1 June 2012, the end date, which is 31 May 2013, and then select the Environmental and Culture Sector.

Figure 45-3: Reports – Defining parameters of the Project Report



Select Excel as the export format of this report and then **click View Report**. The system will open this message box and ask if you want to open or save this report.

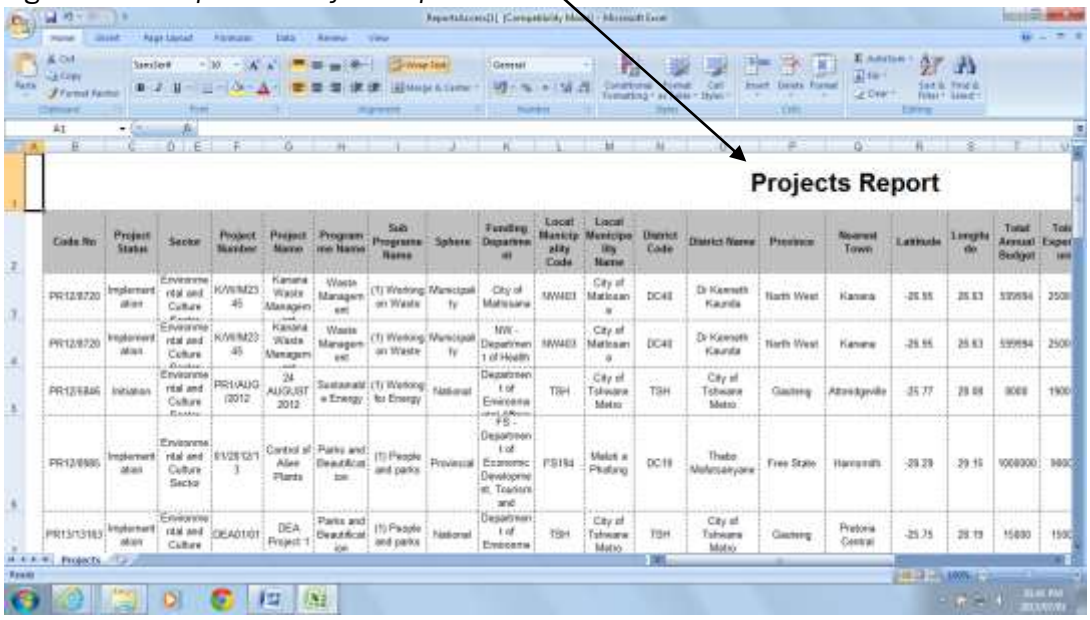
Figure 45-4: Reports – Drawing and viewing a Project Report



Click Open, at this stage.

It will open this report, which contains a list of the Environment & Culture Sector projects that were captured between 1 June 2012 and 31 May 2013 in all provinces of South Africa (e.g. North West, Gauteng and Free State).

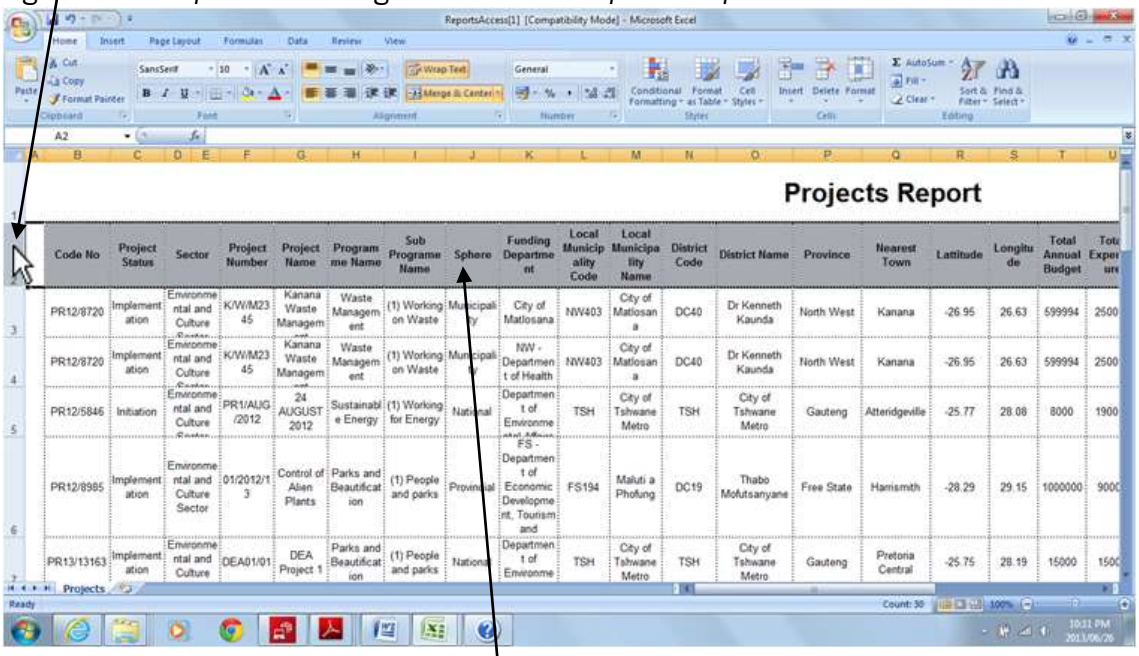
Figure 45-5: Reports – Project Report in Excel Format



The focal point, however, is in EPWP projects of the Cacadu District in the Eastern Cape. To view only those specific projects, follow this Excel filtering process:

Step 1: Move the mouse pointer over to beginning of row 2 – to highlight all the headings in row 2, **click on row 2**.

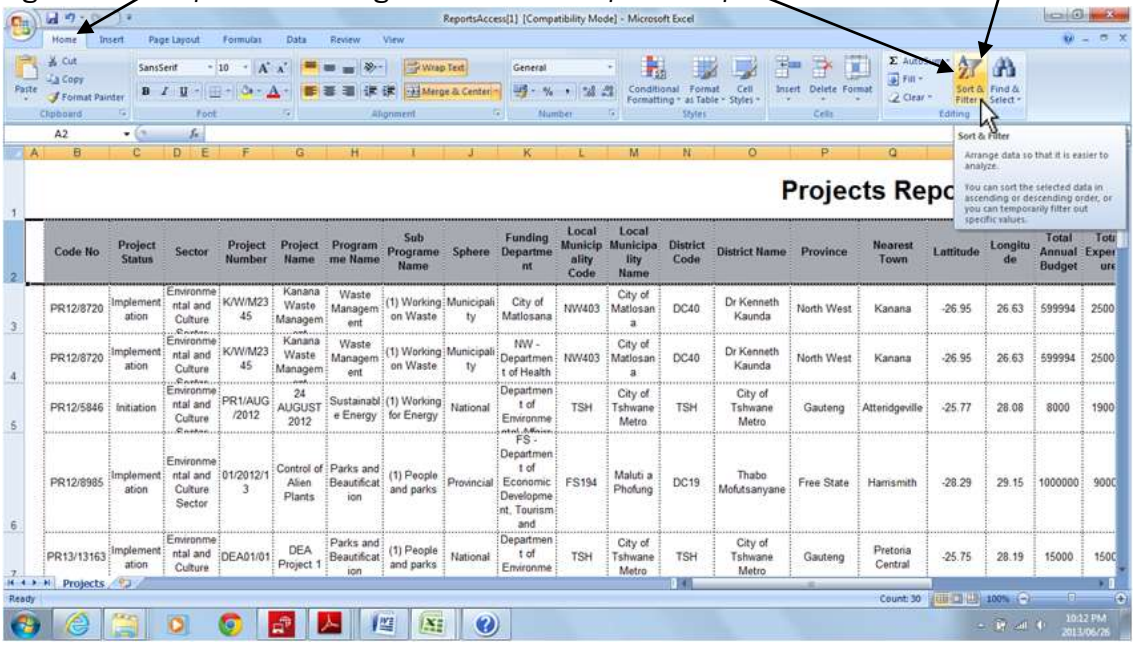
Figure 45-6: Reports – Filtering Process to view specific reports



Make sure that the entire row 2 is highlighted as shown above.

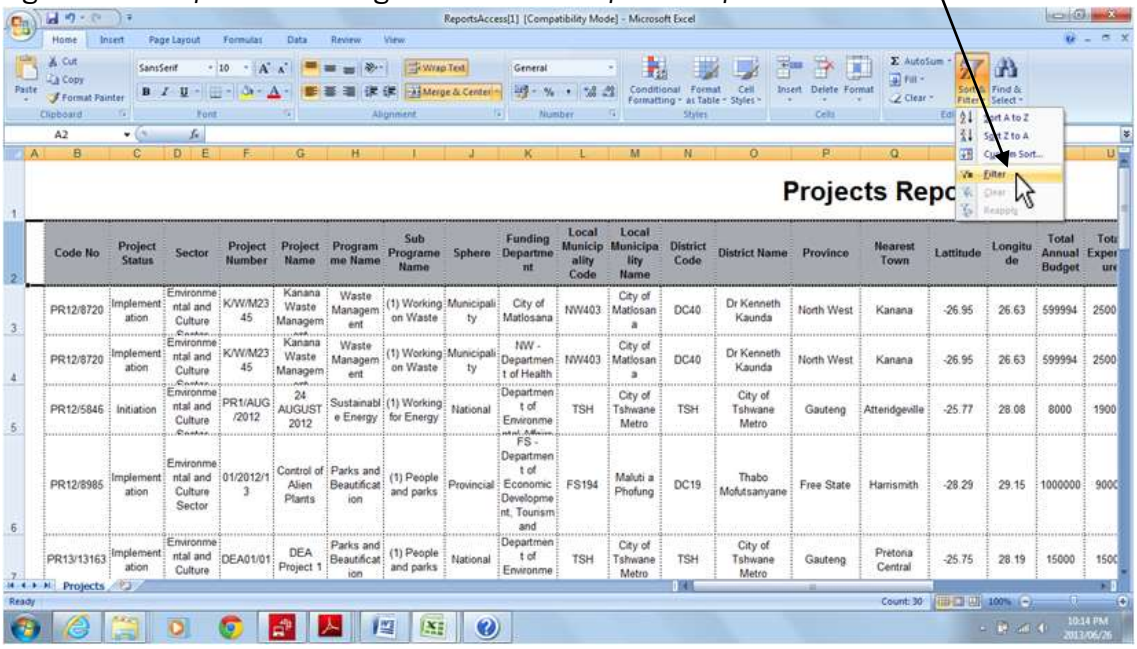
Step 2: Make sure that the **home tab is active** and the move the mouse pointer **Sort & Filter** under the Editing group. Thereafter, **click on Sort & Filter**.

Figure 45-7: Reports – Filtering Process to view specific reports



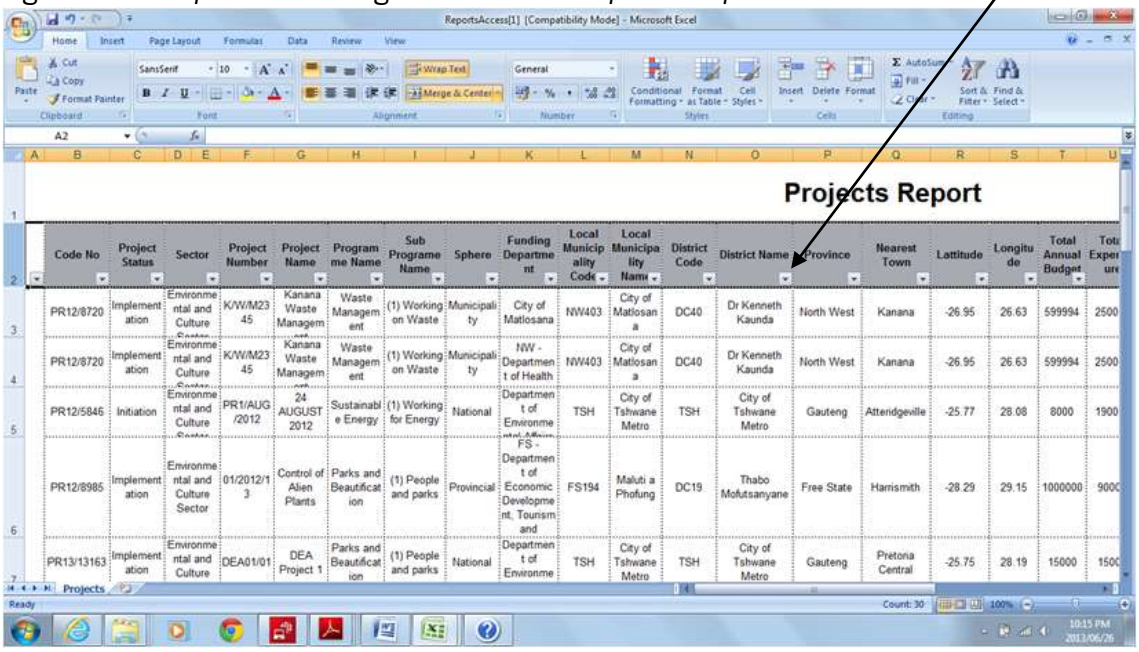
This will show various sort and filter options, and from this group, select Filter

Figure 45-8: Reports – Filtering Process to view specific reports



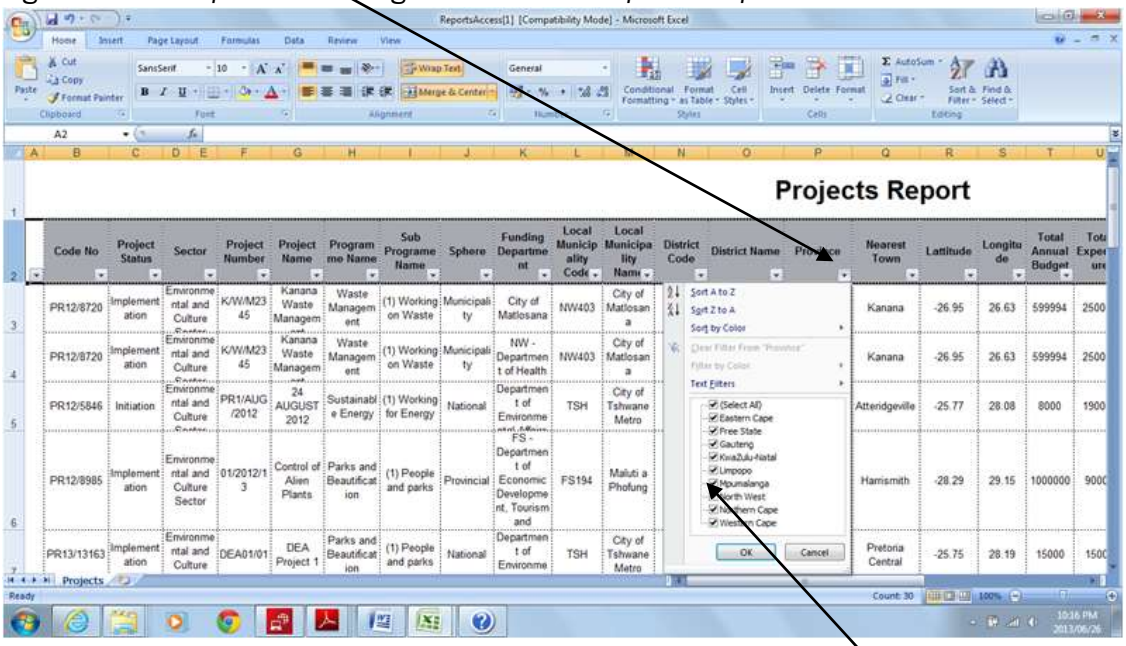
Once the filter is applied, all the headings of row 2, will have the a drop-down arrow , which means that filtering is enabled but not applied.

Figure 45-9: Reports – Filtering Process to view specific reports



Please remember, that our viewer is only interested in projects of Environment & Culture Sector of the Cacadu District in the Eastern Cape. To apply the filter, the viewer has to click on the **province drop-down arrow** .

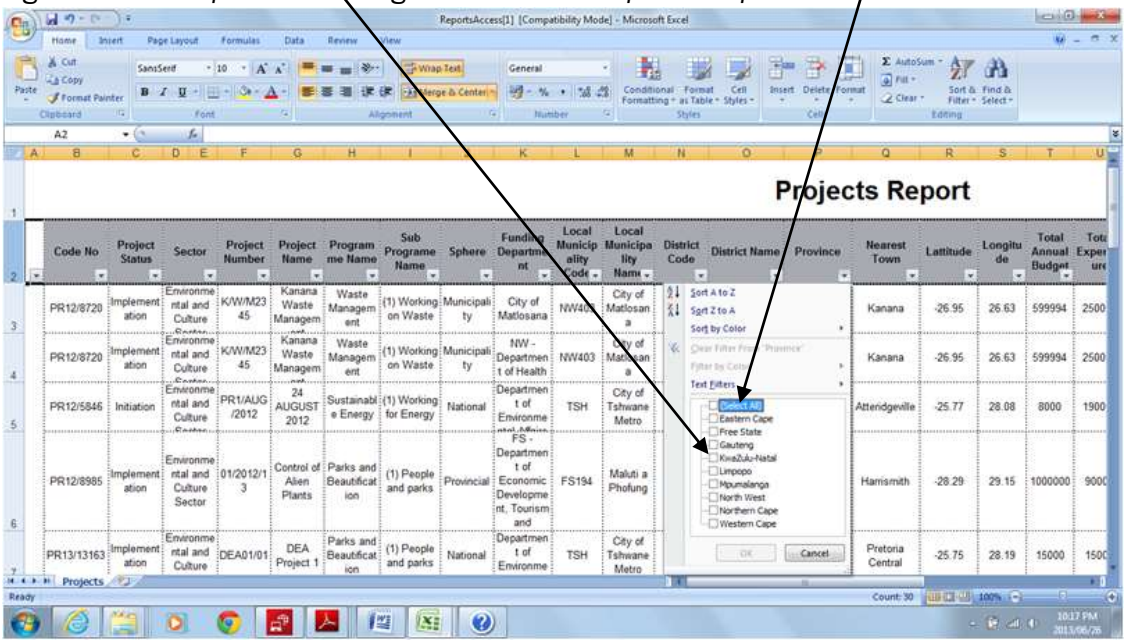
Figure 45-10: Reports – Filtering Process to view specific reports



Environment & Culture Sector projects from all provinces that were captured over 12-month period ending 31 May 2013 would be listed, so all the provinces will have been **selected or ticked**.

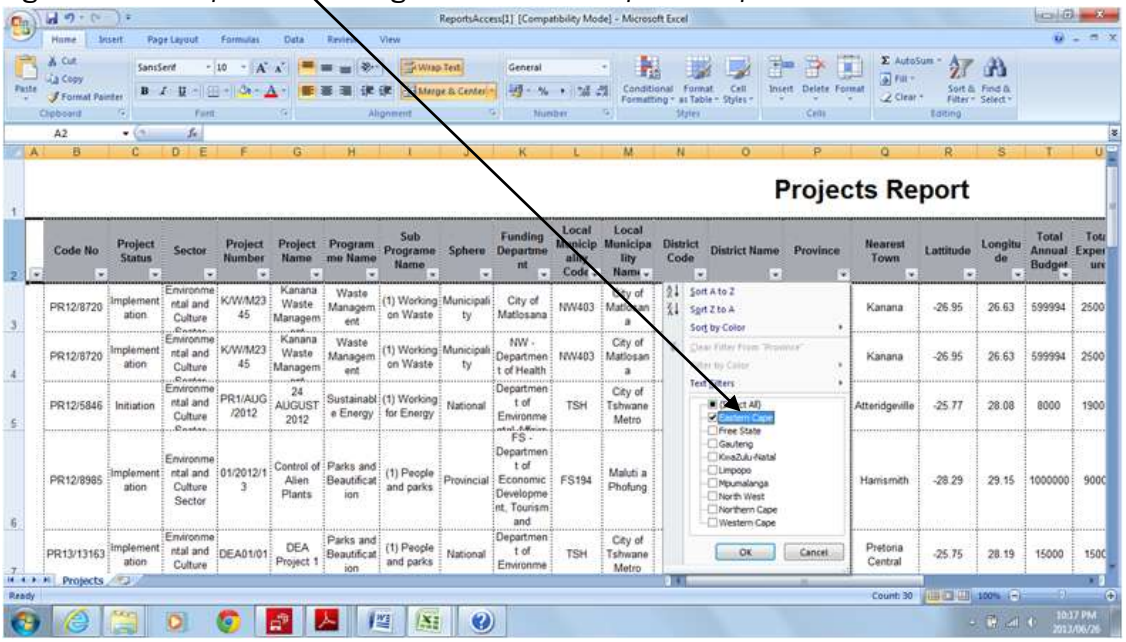
Since, as our viewer, you are only interested in one province, start by clicking on Select All, to deselect all provinces and all ticks will be removed.

Figure 45-11: Reports – Filtering Process to view specific reports



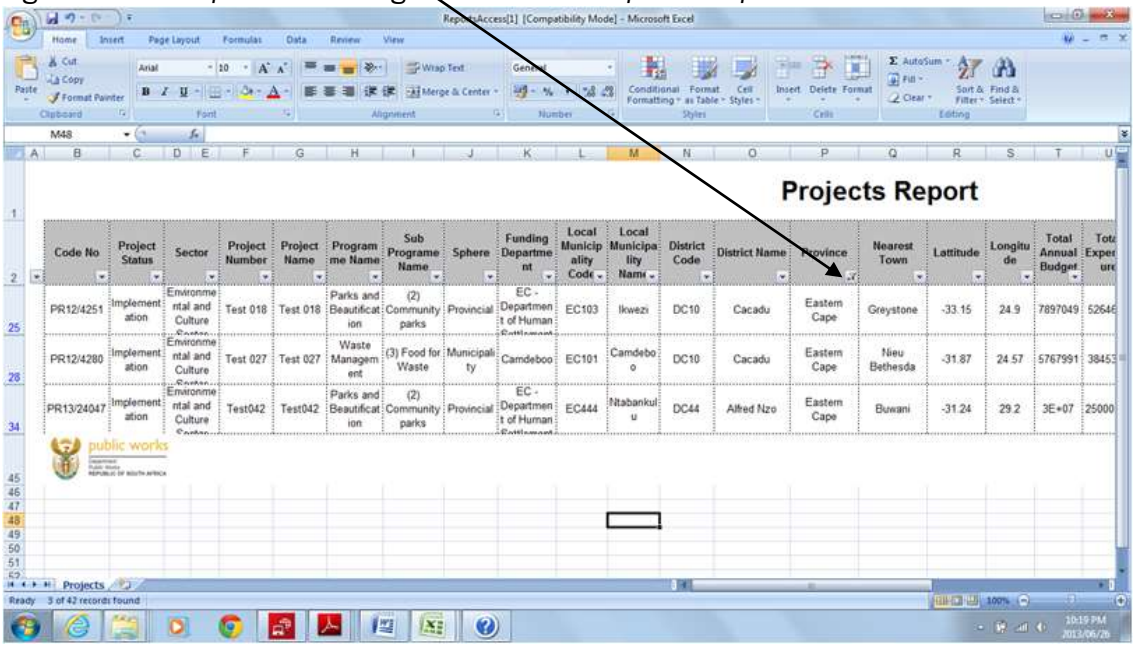
Thereafter, click on the Eastern Cape – once selected, there will be a tick next to it.

Figure 45-12: Reports – Filtering Process to view specific reports



Notice that there is a Filter button next to Province, which means that a filter is applied.

Figure 45-13: Reports – Filtering Process to view specific reports



Furthermore, only Environment & Culture EPWP projects of the Eastern Cape that were captured over the 12-months to 31 May 2013 will appear.

Since there are only 3 projects, we shall not proceed with the filtering process. However, if there were many projects, you would have click on District Name and repeat the above shown process of filtering by:

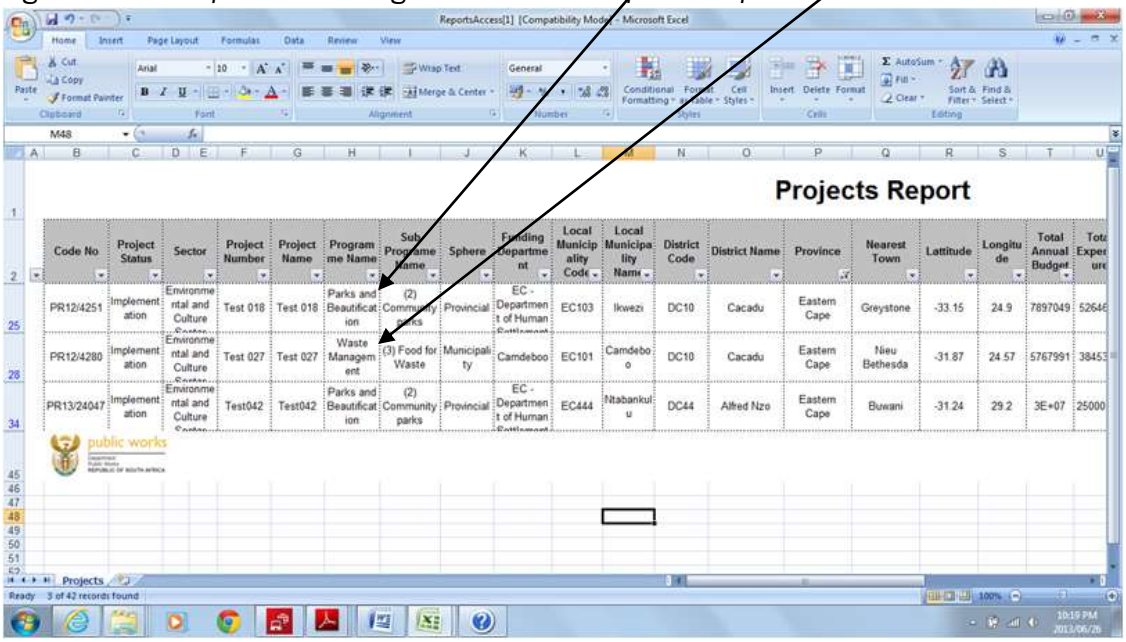
Deselecting all other district, by clicking Select All

Click on Cacadu, as the district of choice

And then only projects that were capture for this district would be shown in the report.

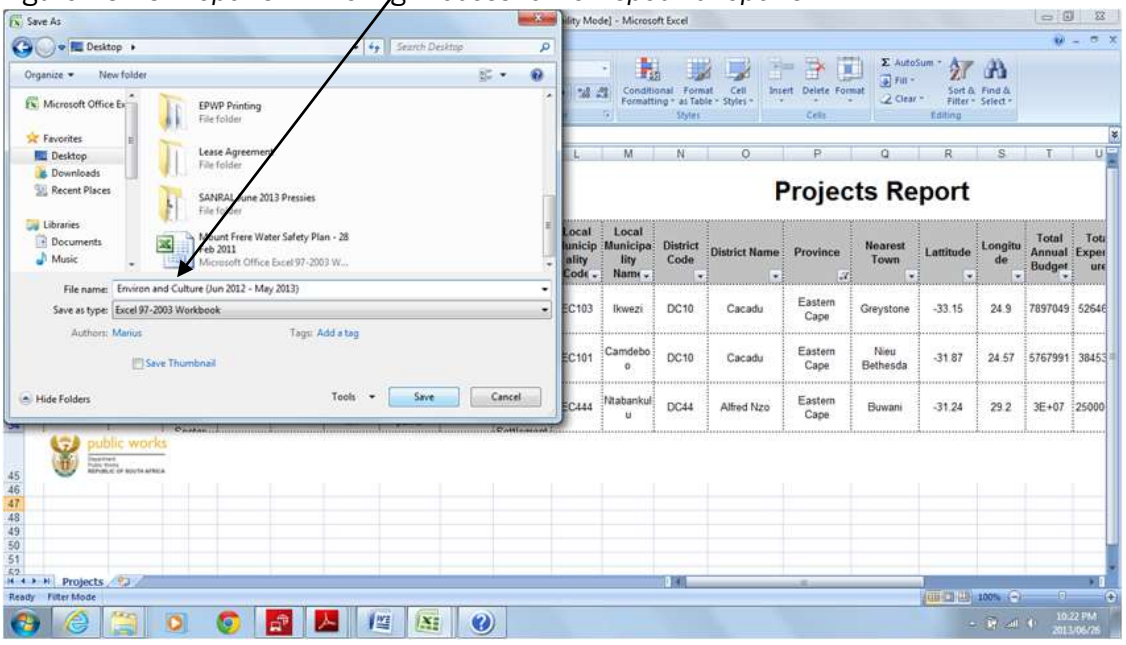
As our viewer, you can see the data of the two projects: (i) a Parks and Beautification EPWP project in the Ikwezi Local Municipality, which is being implemented and (ii) a Waste Management EPWP project in the Camdeboo municipality – also under implementation.

Figure 45-14: Reports – Filtering Process to view specific reports



At this stage our viewer can, then, save the filtered report.

Figure 45-15: Reports – Filtering Process to view specific reports



Please note that once the report has been generated, it can be viewed, saved and printed.

SECTION 8: PROJECT ADMINISTRATION DATABASES

PROJECT ADMINISTRATION DATABASES

On completion of this step you will be able to:

- **Add** new beneficiaries, **Update** monthly data for existing beneficiaries or **Delete** incorrect beneficiary information

8.1 Overview

In database management, the rights of the three user categories are as shown in table A, below.

Table 11: Rights of Users in Database Management

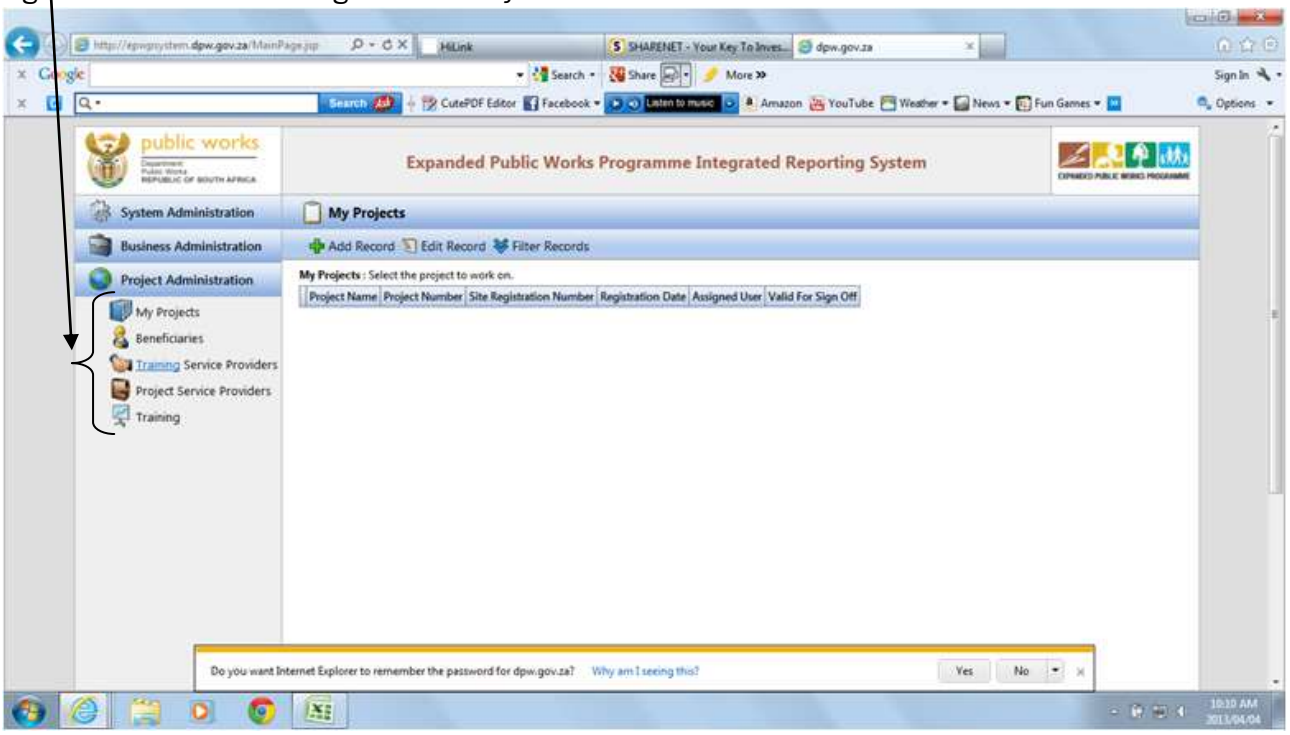
Capturer	Viewer	Authoriser
Beneficiaries (Beneficiary Management)		
Add Record, Edit Record and Filter Records	Filter Records	Not Applicable
Training Service Providers		
Add Record, Edit Record and Filter Records	Filter Records	Edit Record and Filter Records
Project Service Provider		
Add Record, Edit Record and Filter Records	Filter Records	Not Applicable

8.1.1 DATA CAPTURER

For a data capturer, Project Administration consists of five (5) sub-headings:

- My Projects
- Beneficiaries
- Training Service Providers
- Project Service Providers
- Training

Figure 46: Database Management in Project Administration



The sub-headings, Beneficiaries, Training Service Providers and Project Service Providers are all databases, where the data capturer can add, update, filter and in some cases delete the uploaded beneficiary and/or service provider information:

Add new information – add a new project, a beneficiary, training provided, etc

Edit existing information – make changes to already existing information

Filter – filter for specific information, e.g. when searching for beneficiaries with a valid status

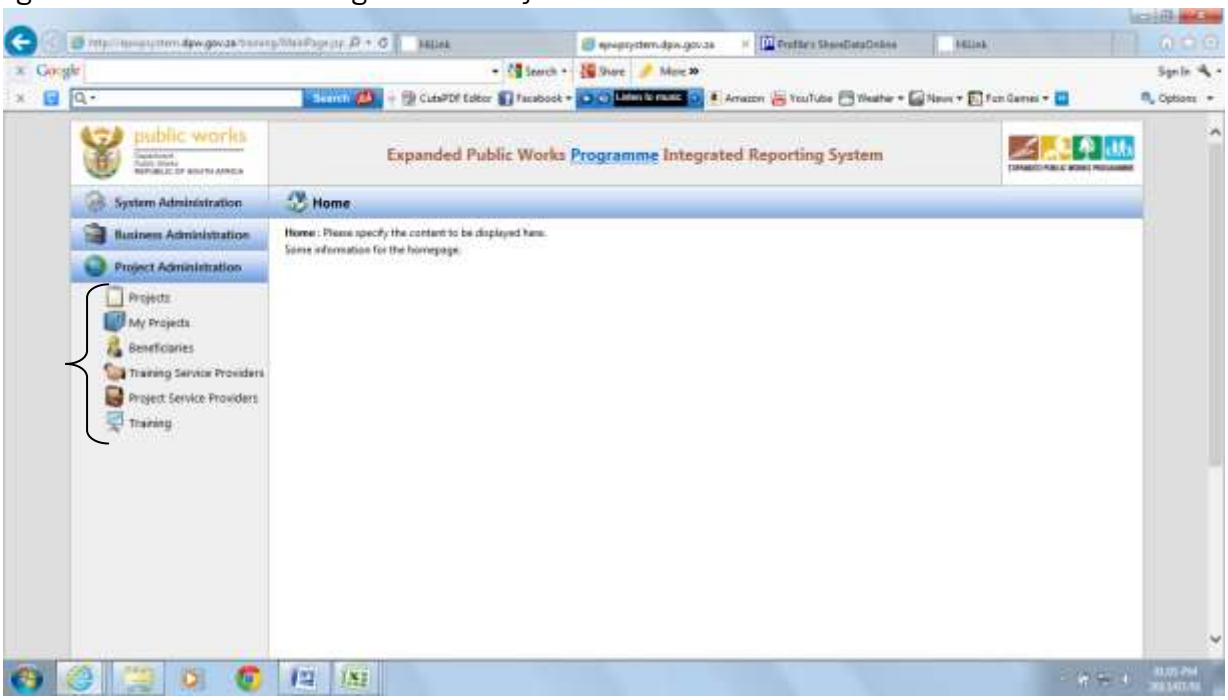
Delete existing information – delete incorrect information

8.1.2 VIEWER

For a viewer, Project Administration consists of six (6) sub-headings:

- Projects
- My Projects
- Beneficiaries
- Training Service Providers
- Project Service Providers
- Training

Figure 46-1: Database Management in Project Administration



Beneficiaries, Training Service Providers and Project Service Providers are all databases, where the viewer can only filter and view the uploaded beneficiary and/or service provider information.

Filter – filter for specific information, e.g. when searching for beneficiaries with a valid status

The viewer's role is mainly limited to viewing, for example under **Projects**, the viewer's rights are only restricted to filtering through the list of projects without seeing the specific details in Project Information.

Figure 46-2: Project Administration – Projects

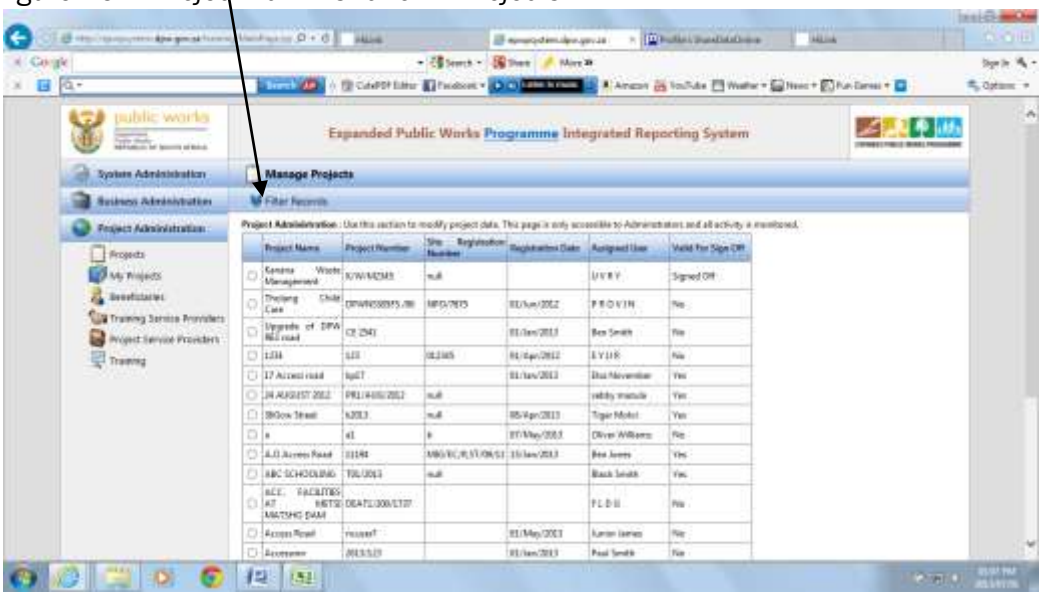
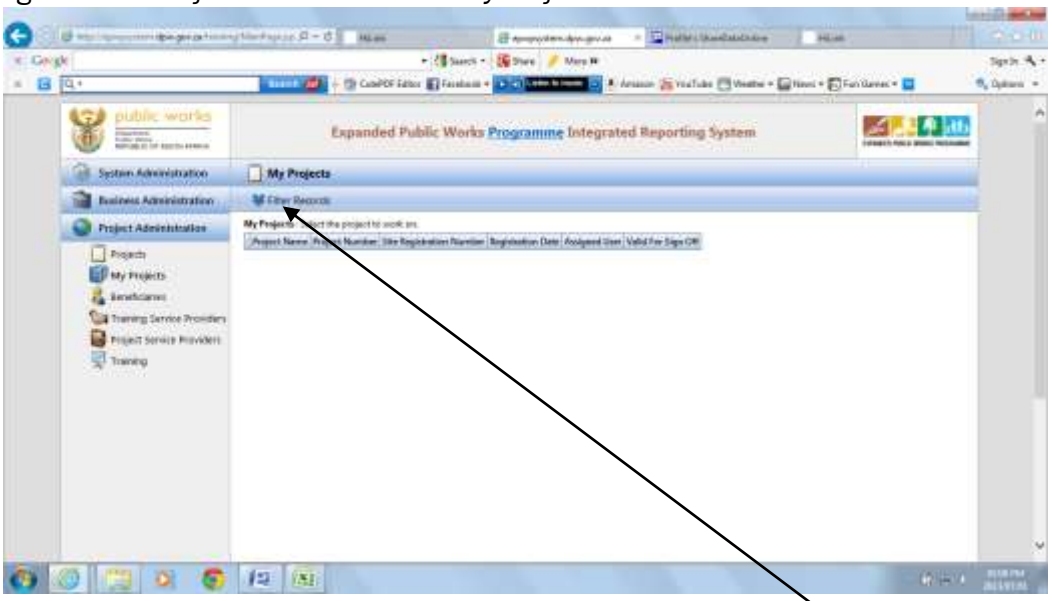


Figure 46-3: Project Administration – My Projects



In My Projects, the viewer's rights are also only restricted to filtering through the list of my projects without seeing the specific details in Project Information.

8.1.3 AUTHORISER

For an authoriser, Project Administration consists of four (4) sub-headings:

- Projects
- My Projects
- Sign-Off Projects
- Project Service Providers

Figure 46-4: Project Administration – Projects

Project Service Providers is a database, where the authoriser can filter the uploaded service provider information.

My Projects

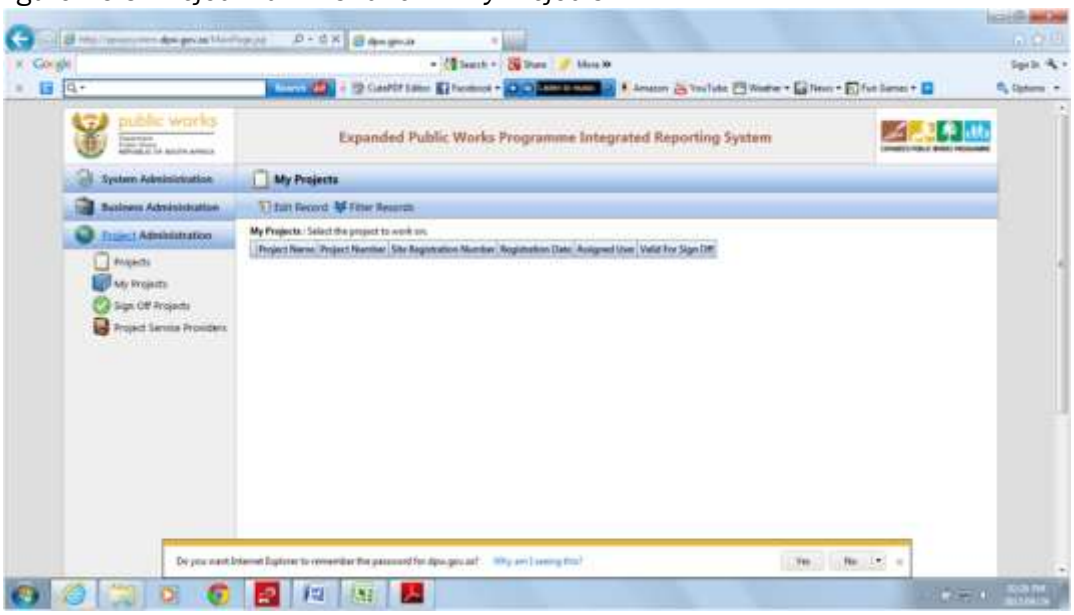
Under the Projects sub-heading, the system permits the user who is registered as an authoriser the right to Edit, Filter and Sign-Off project data:

Edit existing information – make changes to already existing information
Filter – filter for specific information, e.g. when searching for beneficiaries with a valid status
Sign-Off – Sign-Off project data

The ability to Edit Record allows the authoriser the opportunity to view detailed project data under Project Information.

My Projects

Figure 46-5: Project Administration – My Projects



Under My Projects sub-heading, the system permits the user who is registered as an authoriser the right to Edit and Filter project data:

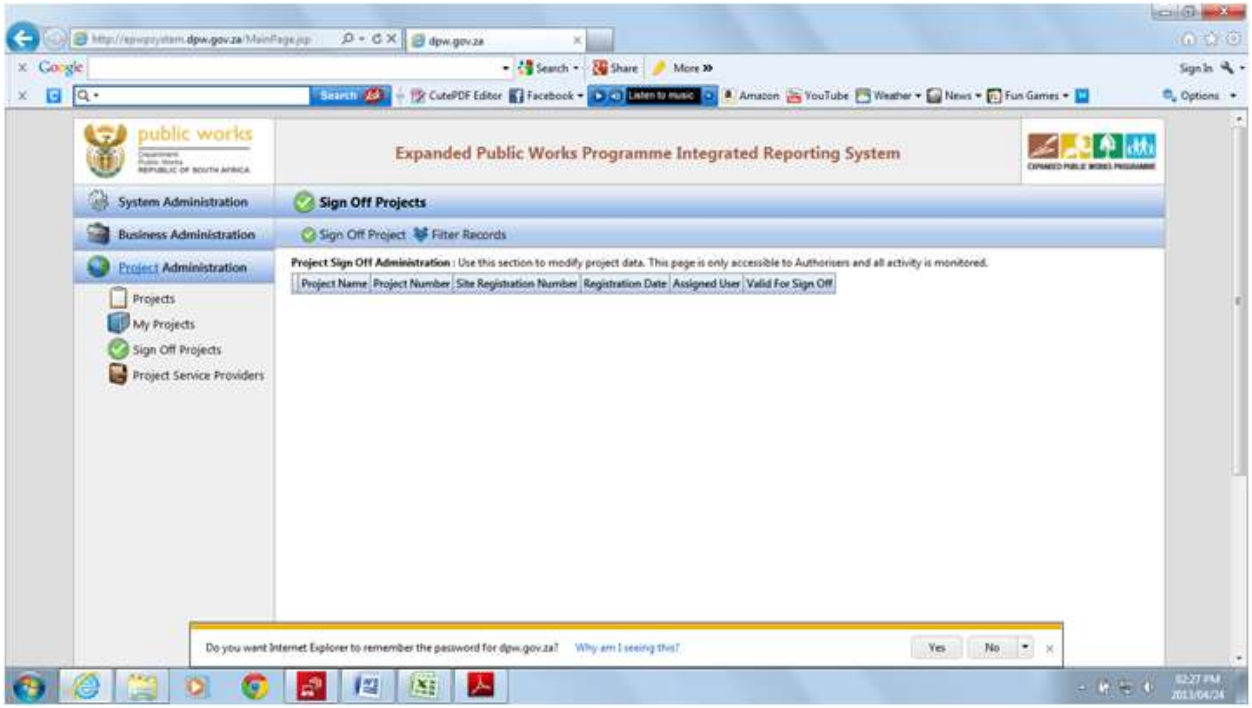
Edit existing information – make changes to already existing information

Filter – filter for specific information, e.g. when searching for beneficiaries with a valid status

The ability to Edit Record allows the authoriser the opportunity to view detailed project data under Project Information.

Sign-Off

Figure 46-6: Project Administration – Sign-Off


Expanded Public Works Programme Integrated Reporting System
System Administration
Business Administration
Project Administration
Projects
My Projects
Sign Off Projects
Project Service Providers
Sign Off Projects
Sign Off Project
Filter Records
Project Sign Off Administration : Use this section to modify project data. This page is only accessible to Authorisers and all activity is monitored.
Project Name
Project Number
Site Registration Number
Registration Date
Assigned User
Valid For Sign Off
Do you want Internet Explorer to remember the password for dpw.gov.za?
Why am I seeing this?
Yes
No

Under the Sign-Off sub-heading, the system permits the user who is registered as an Authoriser the right to Sign-Off and Filter project data:

Filter – filter for specific information, e.g. when searching for beneficiaries with a valid status

Sign-Off – Sign-Off project data

8.2 The System Databases

Project Administration consists of three (3) databases, for:

- Beneficiaries
- Training Service Providers
- Project Service Providers

In this section, the system permits the user who is registered as a capturer the right to Add, Edit and/or Delete data, which means that the capturer has the right to:

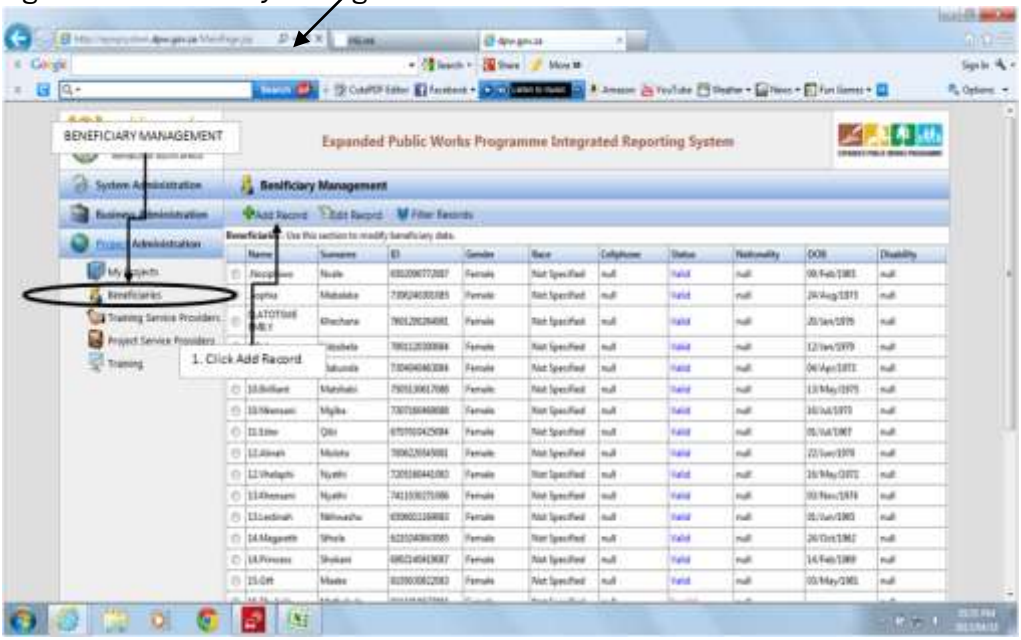
Add new information – add a new project, a beneficiary, training provided, etc
Edit existing information – make changes to already existing information
Delete existing information – delete incorrect information

Please note, that for a new project the capturer normally starts working on Project Administration so as to generate three data fields – Project Code, Course Code and Project Funder – that are compulsory for successfully executing Business Administration or bulk uploading.

8.2.1 BENEFICIARIES DATABASE – MANUAL UPLOADING

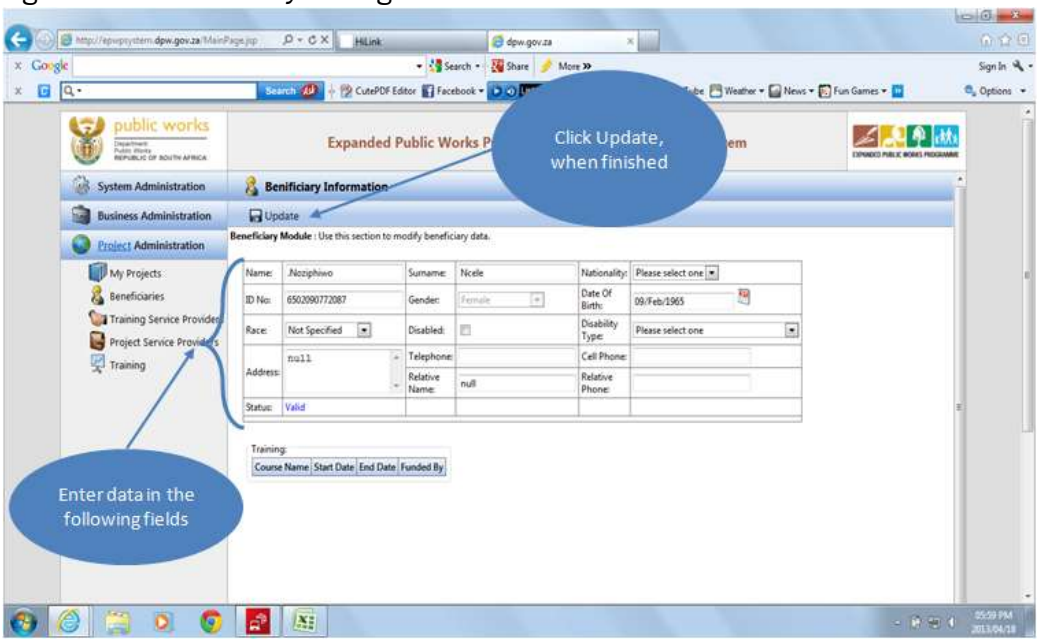
'Beneficiaries' is the second sub-heading under Project Administration. This section provides you with a list of beneficiaries' profiles that have been loaded onto the system from the Public Work's database. This is where a beneficiary's profile can be uploaded manually or through the bulk uploading process. To capture a beneficiary 'manually' click Add Record

Figure 47: Beneficiary Management



The system will open a form where you can capture the profile of a beneficiary; click Update when finished.

Figure 47-1: Beneficiary Management



REQUIRED BENEFICIARY DETAILS FOR PROFILE

Enter the details of each beneficiary according to these headings:

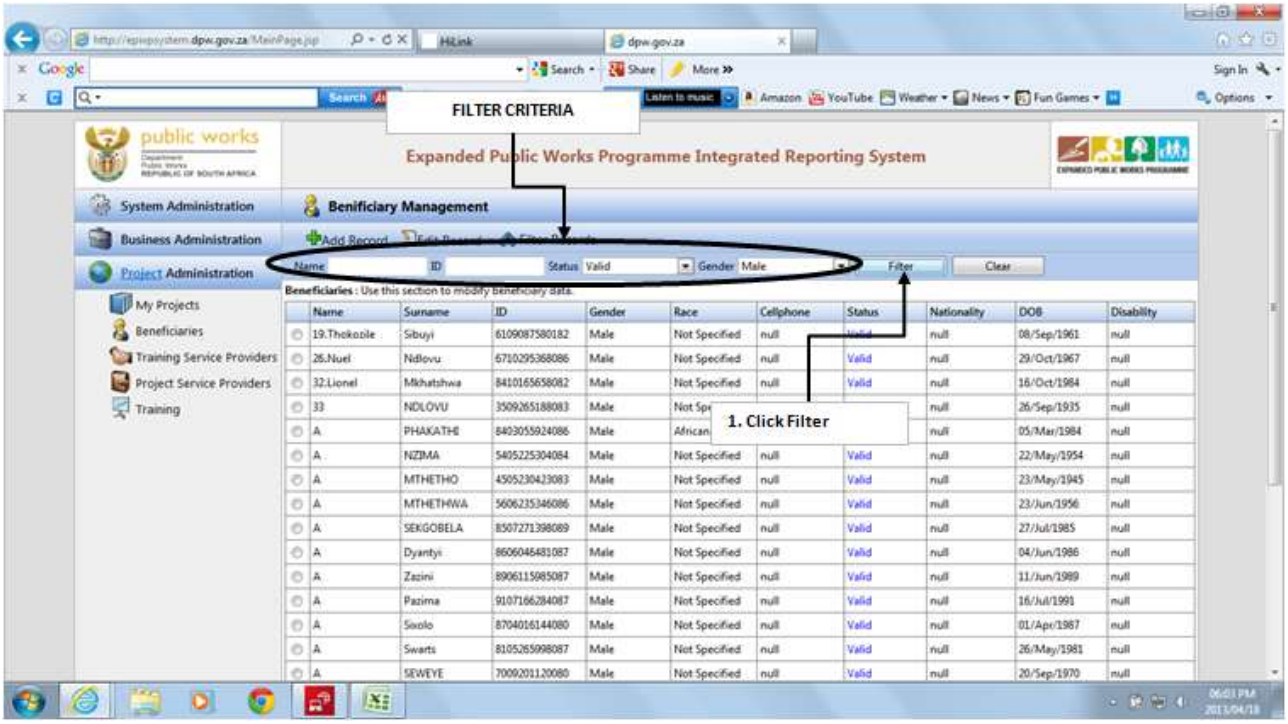
- Name – Type name of beneficiary
- Surname – Type surname of beneficiary
- Nationality – Select nationality from dropdown list
- ID Number – Type ID number
- Gender – Select from dropdown box
- Race – Select from dropdown box
- Disabled – Tick on box if the beneficiary has a disability and select type from dropdown list
- Address – Address of beneficiary
- Telephone – Where beneficiary can be reached
- Cell phone – Where beneficiary can be reached
- Relative Name – Name of a relative that can be reached
- Relative phone – Where relative can be reached

The system will indicate if the status of ID number is valid or not.

Click the Save Beneficiary button and the beneficiary will be added to the system database. This beneficiary can now be captured under employment and training.

The Filter Record option is available to search through the database.

Figure 47-2: Beneficiary Management

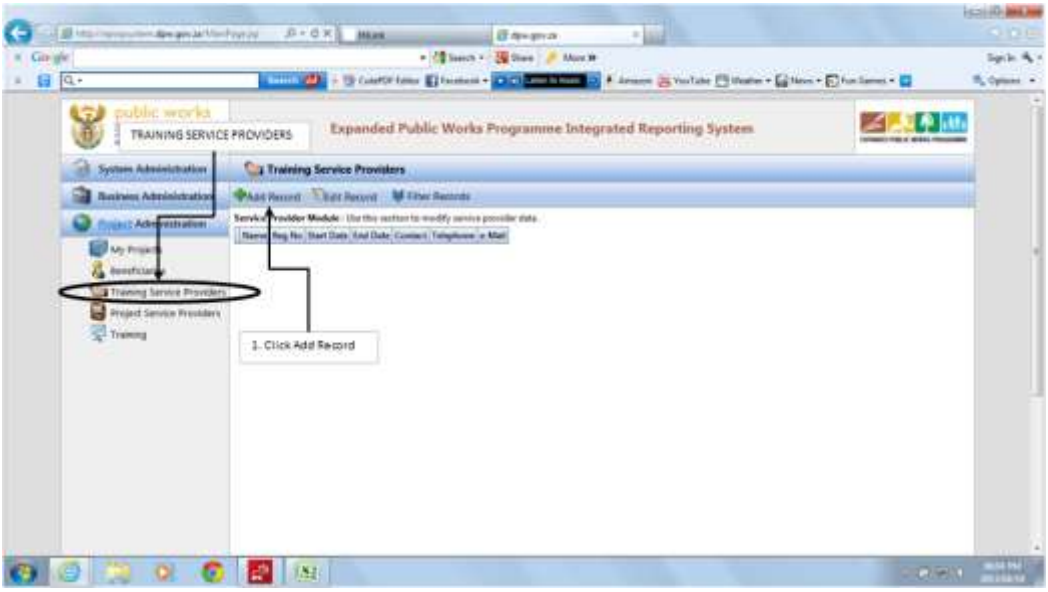


Through the Edit Record option, changes can be made to a beneficiary's profile and then Click Update Beneficiary button.

8.2.2 TRAINING SERVICE PROVIDERS

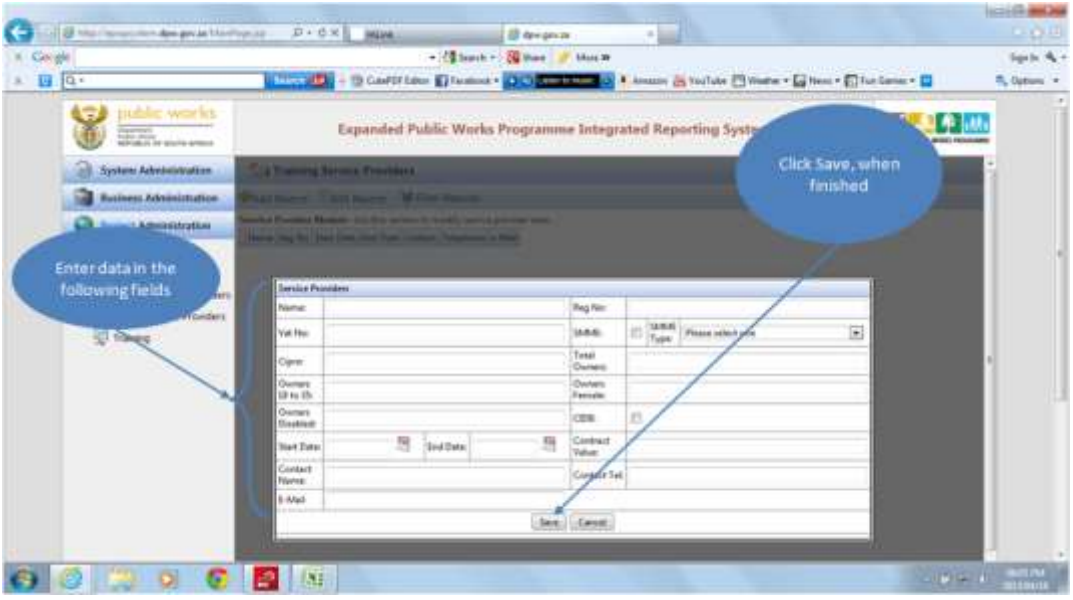
'Training Service Providers' is the third sub-heading under the Project Administration section. In this section you will be able to add training service providers to the system. When you click on the Training Service Providers link, your interface will like the one on *figure 48*.

Figure 48: Training Service Providers


TRAINING SERVICE PROVIDERS
Expanded Public Works Programme Integrated Reporting System
Training Service Providers
1. Click Add Record

When you click on the Add Record button, *figure 48,* a data entry form opens in the format, shown in *figure 48-1*.

Figure 48-1: Training Service Providers

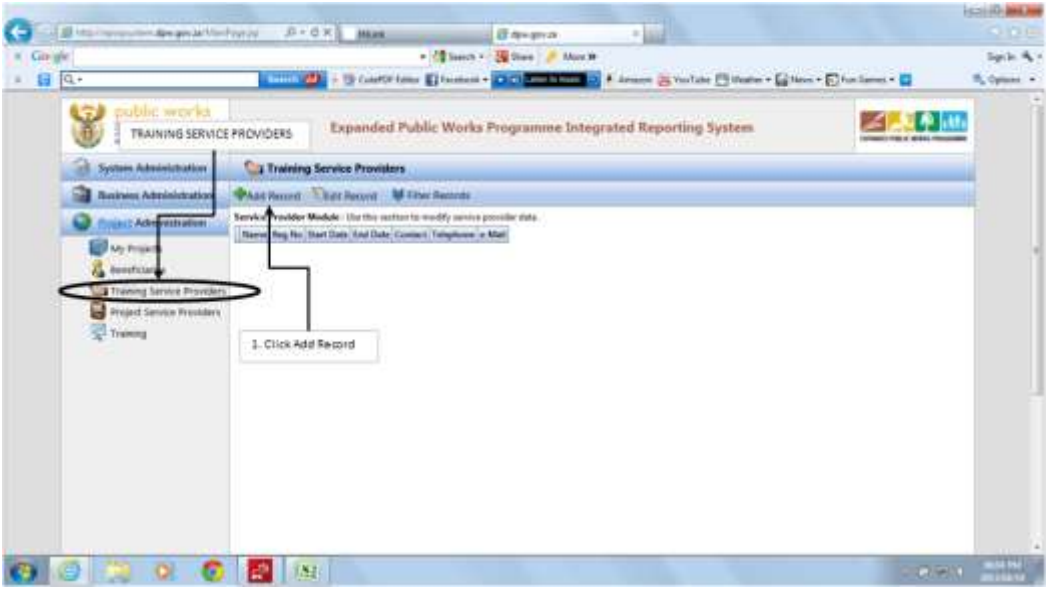


You will then fill in the required data for the service provider and save once done. The Edit Record will open the relevant record to make changes to that particular record and the click *Save* or *Update*.

8.2.3 PROJECT SERVICE PROVIDERS

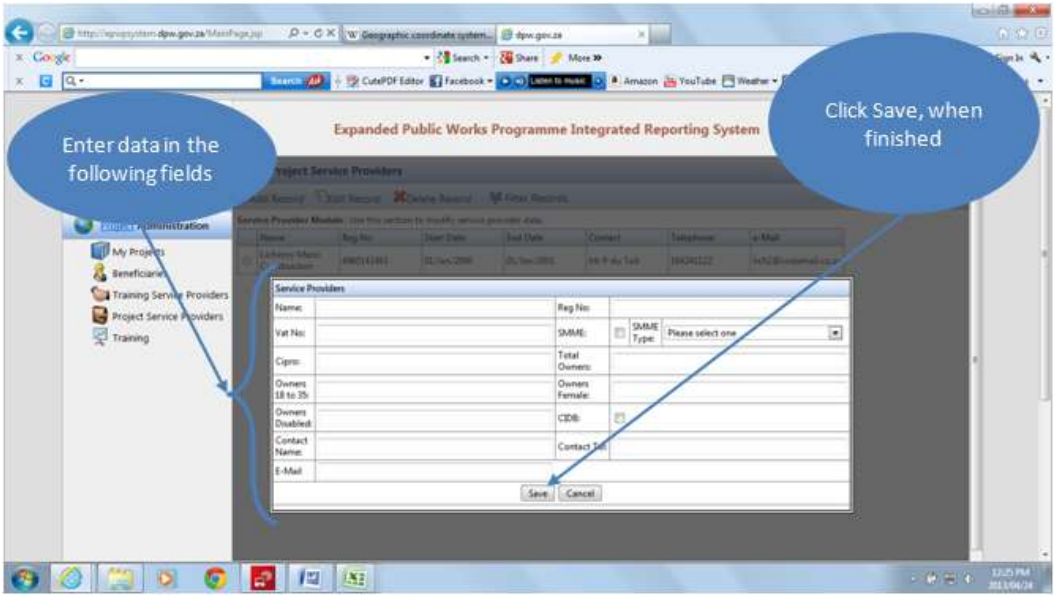
'Project Service Providers' is the fourth sub-heading under the Project Administration section. In this section you will be able to manage a list of project service providers in the system's database.

Figure 49: Project Service Providers


TRAINING SERVICE PROVIDERS
Expanded Public Works Programme Integrated Reporting System
Training Service Providers
1. Click Add Record

When you click on the Add Record button, *figure 49,* a data entry form opens in the format, shown in *figure 49-1*.

Figure 49-1: Project Service Providers details



You will then fill in the required data for the service provider and save once finished.

The Edit Record will open the relevant record to make changes to that particular record and save when finished.

9. CONCLUSION

The EPWP Monitoring and Evaluation Division would like to express its sincere gratitude to all those who participated in training and those who will interact with the system. This Manual is developed in order to broaden their understanding on EPWP reporting and on how to assist system users whilst waiting for a structured training in order to report effectively. Comments and suggestions for improvements are welcome and can be submitted to the EPWP M&E Division as highlighted in the cover page.